D'Arcy's London office caught in Libyan storm

LONDON—The London office of D'Arcy MacManus Masius was caught in the crossfire of last week's clash between the Libyan embassy here and British police.

D'Arcy's offices were evacuated when the embassy, located next door to the agency, was taken under siege.

The incident began the morning of April 17 when Libyan demonstrators marched outside the embassy on St. James Square. Shots suddenly rang out from the embassy, killing a policewoman and injuring several demonstrators. Libyan embassy personnel then barricaded themselves inside, leading to a standoff with police.

As of late last week, the D'Arcy offices were being used by Scotland Yard's crack anti-terrorist unit as operational headquarters.

DMM employes used a fire drill procedure that had been practiced in the past and vacated the premises in 45 minutes.

The various agency departments—media buying and planning, creative and the tv department—all found haven with client companies, art studios and tv studios. Part of the staff was moved to DMM's subsidiary office of Marshall Advertising. Those not needed were asked to stay home.

According to Alan Clark, managing director of DMM, the agency

(Continued on Page 119)

Treasury unit splits with Ad Council

Ad bond is broken

By DAVID SNYDER

WASHINGTON—After 42 years as the Advertising Council's premiere public service ad client, the Treasury Bond division is severing the relationship and is looking for its own agency.

Although the division will maintain its status as a public service advertiser, Treasury officials who guide the savings bond ad campaign believe they will get better results if they pay their own agency to produce the campaign and place the materials.

Although the Ad Council provides free ad agency services, this year's campaign, under the slogan "Take stock in America," is projected to cost Treasury $979,000, mostly in production costs. The total also includes a 9.5% fee for Ad Council overhead.

Treasury officials plan to announce the availability of the account immediately, select an agency by September and have a new campaign in place by December. The account is expected to be priced in the same magnitude as this year's Ad Council effort.

John Benson, account supervisor for Leo Burnett USA, Chicago, Ad Council volunteer agency on the account, has indicated that his agency will not compete.

Treasury officials said changing needs for a changing product, at a time when there is greater competition for a shrinking amount of public service time, influenced their decision. As they describe it, they are selling a product that requires seasonal access to a specific market—workers signing up for payroll savings. This requires better control over the placing of ads than they can get through the Ad Council.

Ad Council president Robert Keim said last week he shares Treasury's belief that an independent agency will be better equipped to handle a savings bonds advertising plan aimed at a more aggressive and product-oriented sales effort.

"We have graduated from the Ad Council," said Jim Gianfagna, director of public communications for the U.S. Savings Bond division, who noted that the demand for savings bonds has increased since

(Continued on Page 113)

No losers in Gaines deal

By NANCY GIGES

The sale of the Gaines pet food business to Anderson, Clayton & Co. by General Foods is a sweet deal all the way around.

The two food companies have announced an agreement in principle in which Anderson, Clayton will purchase and keep intact the $300 million pet food business. Terms were not disclosed.

The deal fulfills corporate objectives of both companies: GF's aim to focus on larger or higher growth-oriented businesses and Anderson, Clayton's desire to expand its food franchise.

The business will continue to be headquartered in Harrison, N.Y., led by current top management. Ralph J. Cobb, GF vp and president of the pet food division, will continue to head the division for Anderson, Clayton.

Marketing manager Robert Pizzuti recently was reassigned to GF's newly acquired Ronzoni pasta and Italian foods business, but the position will be filled soon, a GF spokesman said.

The deal allows GF to focus its resources and efforts on other opportunities, including Ronzoni, Oscar Mayer processed meats, diet beverages and the expansion of Entenmann's baked goods (AA, April 16).

GF chairman James Ferguson noted, "Because of the investments of human and financial resources which will be required to support our expanded product portfolio, we see difficulty in supporting Gaines to the full extent it needs and deserves so it can remain competitive and grow in the pet food business."

As for Houston-based Anderson, Clayton, that company has been trying to expand in the food business for 10 years and has failed several times to purchase other operations.

Last year, it made a tender offer to buy Norton Simon Inc., which accepted a competing offer from Esmark Inc. The company was especially interested in NSI's Hunt-Wesson Foods subsidiary. Earlier, Anderson, Clayton tried and failed to buy Gerber Products and Stokely-Van Camp.

Anderson, Clayton's food operations include Chiffon margarine and Seven Seas salad dressing. Pet foods under the names Gaines, Cycle, Gravy Train and Top Choice will become Anderson, Clayton's largest consumer-products business. The company also has an an-

(Continued on Page 113)

world news roundup

MILAN—McCann-Erickson Italia won the $2.5 million Agusta Helicopter Co. account from J. Walter Thompson Co.

TOKYO—Newsweek is expected to decide by this summer whether to publish a Japanese-language edition of the news magazine, according to *Newsweek* sources (AA, April 2).

SYDNEY—The Federation of Australian Commercial Television Stations rejected only 372 of 18,637 tv spots last year, the lowest number in recent years. Spots were rejected if they tried to influence children, if they displayed unsafe driving behavior or if they were in bad taste.

DUESSELDORF—Team/BBDO Group has lost the $2 million account of Robert Bosch Inc. household appliances to Brauch, Hube & Partner of Munich.

TORONTO—Molson Breweries is planning to brew Germany's Lowenbrau beer, a leading Canadian import, in Canada under a licensing agreement with the German brewer. No launch date has been set, but a news conference was scheduled for later this week to announce the plans.

LONDON—Spar, the British supermarket chain, will launch a $2.5 million campaign via Grandfield Rork Collins to combat the U.K. entry of

(Continued on Page 55)

Top brands, logos provide marketers 'license' to deal

By JAMES P. FORKAN

NEW YORK—More and more major marketers have been finding a major new revenue source for their most popular brands, logos and highly familiar advertising characters: Licensing.

By means of what industry executives label "trademark licensing" or "corporate licensing," these companies have broadened their reach in terms of shelf space and media exposure while generating sometimes considerable profits.

Eastman Kodak is putting its name on a Fisher-Price product.

On the other end of the transaction, various toy companies and others involved in selling lunch boxes, apparel, books and more can latch onto a property already highly visible and well liked, thanks to decades of hefty, multi-million-dollar tv and print ad campaigns.

Jerry Alpert, president, Licensed Ventures International, corporate licensing agent for Kellogg Co., Nabisco Brands and Campbell Soup Co., saw those and other marketers benefiting from the licensed-merchandise boom.

Total retail sales of licensed products should top $30 billion this year, he estimated, compared with $4 billion in 1978.

According to "Licensing Letter," the toy business alone accounted for about $5.3 billion in licensed product sales last year—which amounts to roughly half the toy industry's total retail sales volume of $10 billion in 1983 (AA, Feb. 13). Toy industry executives expect at least to equal those levels in '84.

Kellogg, Mr. Alpert estimated, stands to realize $30 million in profits this year alone from the li-

(Continued on Page 120)

Lawyers' tv ad spending

Hyatt Legal Services' spending on tv advertising is more than triple that of its closest competitor. The spending drops off quickly, with the third through tenth ranked firms spending less than $600,000. *Source: Television Bureau of Advertising compilation from Broadcast Advertisers Reports data.*

Service	Market	1983	1982	Change
Hyatt Legal Services	Multi-markets	$3,090,000	$2,280,000	+ 36%
Jacoby & Meyers	Multi-markets	823,200	1,710,000	– 52%
Larry H. Parker Law Office	Long Beach, Cal.	562,200	283,800	+ 98%
Norton Frickey & Associates	Denver, Colorado Springs	556,400	307,900	+ 81%
David Grey, Attorney	Los Angeles, San Diego	472,800	282,600	+ 67%
Saiontz & Kirk Lawyers	Baltimore	395,000	159,700	+147%
Levine & Jarvis Legal Clinic	Phoenix	370,500	95,200	+289%
Harvey L. Walner Attorney	Chicago	289,200	—	—
Consumer Services Organization	Chicago	287,300	350,800	– 18%
Ronald M. Sharrow, Attorney	Baltimore	246,600	193,300	+ 27%

Ads: A case of contention

The husky convict is escorted down a desolate hallway into a room where he is strapped into an electric chair. Asked if he has any last words, the man wrinkles his face and bleats, "I should have called a legal clinic." The switch is thrown, the lights dim and there on the dying man's broad chest, little bulbs light up with the telephone number to Ken Hur's Legal Clinic.

—Ken Hur's newest commercial, still in production

By TERESA H. BARKER

For critical colleagues who thought lawyer Ken Hur's first commercial was, as one said, "absolutely the most deplorable example of lawyer advertising you can

(Continued on Page 119)

Lawyers seen easing tv use

By MAURINE CHRISTOPHER

NEW YORK—Just as lawyers become one of the fastest-growing contingents in tv advertising, high costs and the saturated marketplace may begin to slow the trend.

A spot sampling of the top 20 lawyer advertisers found that most are still enthusiastic about tv as a means of getting their story across to potential customers, particularly low and middle-income people.

But especially if inexpensive radio commercials prove effective at gaining new business, tv advertising may lose some ground.

At the same time, the pioneers of lawyer advertising, who moved into tv as soon as the U.S. Supreme

(Continued on Page 103)

Olympic tie fuels Fuji's assault on Kodak

By GAY JERVEY

New York—Fuji Photo Film Co. will continue its battle against Eastman Kodak next month, when it launches the largest ad campaign in the company's history—one that emphasizes Fuji's role as an official sponsor of the 1984 Summer Olympics (AA, April 9).

The effort, which represents an increase of some 20% over Fuji's 1983 budget, is sure to raise the temperature of the already hot U.S. film market.

Over the last few years, Fuji—a name as synonymous with amateur photography in Japan as Kodak is here—has mounted its challenge to Kodak on these shores, where the Rochester-based company has commanded an overwhelming 85% to 90% market share.

Kodak has shown no signs of giving ground. To the contrary, Kodak this year inaugurated the most expensive film campaign ever as a means of reminding consumers that moments can last forever—but only on film.

Themed "Because time goes by," the effort shows vignettes of reunions of war veterans, black jazz musicians and baseball players.

For its part, Fuji's new campaign, which starts May 14, will run nationally and primarily involve tv and radio. Print ads will be limited to *Sports Illustrated's* Olympic preview issue and the official Olympic handbook distributed at the games.

Carl Yanowitz, Fuji's advertising director, declined to reveal ad budgets, but Fuji is expected to spend $7 million during the rest of 1984.

Fuji's new campaign carries a two-pronged message. In addition to stressing the acknowledged color quality and realistic renditions of its HR film line, the company hopes to further America's awareness of its Olympics sponsorship.

Fuji's impending tv effort stars former Olympic athlete Ann Meyers and contains a voiceover highlighting Fuji's sponsorship.

The new spot follows the basic creative tack of Fuji's 1983 campaign, which was tagged "Breakthrough" and showed water skiers flying through a giant Fuji picture of a boat.

That campaign ran in 35 to 40 markets, Mr. Yanowitz said.

In the ad with Ms. Meyers, the former basketball star is shown careening down a narrow San Francisco street on a bicycle. Wait—isn't that a street car she's plowing through? Not to worry, it's only a blowup of a Fuji print.

In addition to tv, the company is running a radio campaign with a similar message. They also feature several former Olympic greats: Jim Ryun, a silver medalist in the 1968 Mexico City games, and the youngest runner ever to break the four-minute mile; swimmer Don Schollander, who won four gold medals in the 1964 Tokyo summer games, and, of course, Ms. Meyers.

Analysts agree that Fuji has a product worth touting. Most industry executives and photographers describe Fuji film as equal to Eastman Kodak's. Some give Fuji higher marks for consistency.

No doubt, Fuji's green film boxes have been gaining a presence here. Since the fight for market share gained steam in 1981—when Fuji waved some $7 million before Olympic organizers and snared the official sponsorship away from Kodak—analysts estimate that Fuji has more than tripled its film sales and increased its market share from near zero to some 7% to 8%.

But the question remains whether these gains have come at the expense of Kodak or other, far more vulnerable, film marketers such as Agfa-Gevaert and 3M.

With some 70%-plus of the Japanese film market, Fuji will continue to look abroad for sales. Even if Fuji is just nibbling at the edges here, Kodak will continue to take notice, and its executives are expected to stress Fuji's competition at the company's annual meeting next month.#

HOW CORONET BECAME A BIG SHOT.

When Coronet VSQ wanted to stir up business in the nation's #1 domestic brandy market, they called us. And with one simple advertising buy, they gained beverage leverage with 76%* of the Milwaukee market every day. Enough to become the #1 brandy in Milwaukee. No other newspaper in the top 30 markets delivers like that.

So if you want to take your marketing efforts straight up in Milwaukee, give it your best shot. And call (414) 224-2472.

The Milwaukee Journal/Milwaukee Sentinel

The top combination in the top 30 markets.

Member Million Market Newspapers, Inc.
*Source: 1983 Scarborough National Newspaper Audience Study.

Trane ads pitching comfort

La Crosse, Wis.—Trane Co., marketer of heating and air-conditioning products, will spread the theme "Comfort's coming" nationwide with the debut of two 30-second tv spots this week.

The campaign will be the first in 18 months for Trane's consumer products division since the company purchased General Electric's central air conditioning department in September, 1982.

Trane's goal is to increase consumer-product brand awareness, supported by this multi-million-dollar network tv buy.

One spot features a fleet of 18-wheelers, boldly flagging the Trane logo, traveling on a state highway. The other spot focuses on a fleet of the company's smaller delivery vehicles that arrive in a small American town. Both carry the same jingle and the theme "Comfort's coming."

The spots will run for six weeks, when the company will launch a follow-up campaign, probably with more tv spots, according to Jean Bell, Trane advertising manager. Further details were not disclosed.

A dealer co-op campaign, including print, radio and outdoor, will support the new campaign. Budget was not disclosed.

Campbell-Mithun, Minneapolis, handles.#

corrections & clarifications

- Australian police charged Austin Begg, founder of Begg Dow Priday, with conspiring to defraud a former client, not the agency (AA, April 16, P. 50).
- The production company for Greyhound Lines' "Knock, knock" spot, created by Bozell & Jacobs, and Holly Farms Poultry's "What about taste" spot, created by Grey Advertising, featured in the Advertising Age Best Commercials of 1983, is Coast Productions (AA, April 2, P. M-44).
- In the Agency Profile issue (AA, March 28, P. 70), it was incorrectly stated that Newmark, Posner & Mitchell neither gained nor lost accounts in 1983. In fact, the agency did not submit information regarding account activity.
- Rock Music Trivia is being sold by Pressman Toy Corp., New York, under license from Playtoy Industries of Canada (AA, March 26, P. 52).#

Magazine licensing boom

Who licenses foreign editions

Publication	Nations where edition is licensed	Circulation
Cosmopolitan	Australia, Brazil, Britain, France, Germany, Greece, Italy, Japan, Latin America, Netherlands, South Africa, Denmark*, Sweden*, Norway*	2,270,000
Playboy	Australia, Brazil, France, Germany, Italy, Japan, Mexico, Netherlands, Spain, Hong Kong*	1,700,000
Penthouse	Australia, Germany, Japan, Spain, U.K.	1,200,000
Reader's Digest	Colombia, Greece, Korea, India, Middle East	660,000
Good Housekeeping	Australia, Japan, Latin America	606,568
Scientific American	China, France, Germany, Italy, Japan, Spain, U.S.S.R.	349,626
Science Digest	Australia, Denmark, Italy, Norway, Sweden	250,000
Harper's Bazaar	France, Italy, Latin America, Australia*, Germany*	248,048
Popular Mechanics	Latin America	177,100
Inc.	Japan	NA
High Technology	Japan	NA
Rolling Stone	Japan*, Germany*, U.K.*	—
American Health	Japan*, Germany*, Latin America*	—

*Countries where licensing agreements are in planning, under consideration or in negotiation.
Source: Advertising Age

An increasing number of U.S. consumer magazines are licensing editions to tap overseas markets.

Overseas licensing growing

By DENNIS CHASE

NEW YORK—U.S. consumer magazine publishers have a gleam in their eyes these days when they talk about foreign markets.

As profitability in the U.S. has dwindled, many publishers who for years refused to license their magazines overseas now are doing an about-face.

Others, more experienced in licensing, no longer are ignoring regions of the world—such as the Far East—that seem difficult to penetrate.

"We're getting 50% more requests for information about licensing than six months ago," says Lee Hall, head of the new Playboy International Publishers Service, a 1-year-old magazine licensing consultancy.

In the past several months, *Working Woman*, *Newsweek*, *Harper's*, *American Health*, *Rolling Stone* and others have begun looking at licensing editions outside the U.S.

Publications with long licensing histories, such as *Cosmopolitan* and *Playboy*, are about to approve their first licensed Chinese-language editions in

(Continued on Page 56)

'Cosmo' wins copycat fight in W. Germany

By KEVIN COTE

WEST BERLIN—Upstart German publisher Alfons Czerny of A.C. Verlag thinks he has an answer to William Shakespeare's question "What's in a name?"

Last month, Mr. Czerny changed the name of his *Metropolitan* mag-

(Continued on Page 56)

Hearst's *Cosmopolitan* in Germany battles copycat *Metropolitan*.

Playboy looking for U.K. licensee

By ANGELA CHATBURN and DENNIS CHASE

LONDON—Playboy Enterprises, struggling with a faltering flagship publication in the U.S., is turning to foreign markets for help.

The company is talking with nine U.K. publishing groups about licensing *Playboy* for the first time in Britain, the scene of a gambling scandal several years ago that resulted in the company losing its highly profitable casino license.

Playboy considered publishing in Britain then, but backed off after the scandal.

If it goes into the U.K., *Playboy* will be gambling it can create a new upmarket niche in one of the raciest downmarkets for men's magazines in the world, where all the leading publications look like *Hustler* in the U.S.

That environment has caused even archrival *Penthouse* publisher Bob Guccione to retreat. Last year he partly abandoned Britain, where *Penthouse* was born in 1965. He licensed the *Penthouse* name in the U.K. to Sightline Publications because it could not compete with its racier rivals.

"It will only work if we can break out of that environment and change the minds of upmarket advertisers who are now leery of all men's magazines," said Lee Hall, senior vp-international publishing for Playboy Enterprises.

The other drawback is that magazine distribution in the U.K. is dominated by "news agents" who bunch all men's magazines together on the top shelf of their magazine racks.

"We'd want to be on the front counter with the prestige magazines," said Mr. Hall.

Until last month, *Mayfair*, the leading U.K. men's magazine with a 350,000 circulation, was the only such publication distributed by W.H. Smith, Britain's leading news agent. Now *Penthouse* has been accepted by the agent.

Mr. Hall is interested in Britain despite the problems because he sees ads geared to males in science magazines that would look to *Playboy* instead.

"The British male is changing very fast," he says. "They're a far cry from the days when they all wore bowler hats." However, others disagree.

Adrain Walker, *Mayfair* ad director, says that if *Playboy* comes to Britain "it would be with a fairly sophisticated product, and I don't see that sort of product getting the sales."#

Philip Morris may sue BAT in Brazil

By LAUREL WENTZ

SAO PAULO—Philip Morris Inc. might take legal action against British American Tobacco in a dispute over an alleged "copycat" brand in the low-tar cigaret market, sources said.

BAT's Souza Cruz recently began test-marketing Free cigarets, a brand with similar packaging and identical tar and nicotine content to PM's Galaxy brand, which accounts for 60% of the new low-tar, low-nicotine segment.

Stung, PM promptly arranged for a local court to seize samples of Free to be scrutinized for a possible future lawsuit and asked CONAR, the Brazilian advertising self-regulatory body, to suspend Free's test-market advertising.

After a CONAR hearing in Sao Paulo on April 12, CONAR postponed its decision and the two cigaret giants were attempting to arrange an out-of-court settlement.

"We were obliged to do this," PM vp Antonio Texeira da Silva said of his company's action against BAT. "Since Souza Cruz copied our package, we took an attitude of defending our property."

Both Free and Galaxy packs feature a red-and-blue stripe on a white background and a gold heraldic emblem. According to BAT spokesman Francisco Crestana, the 10 top brands—accounting for 75% of the market—all use basically the same colors and no one has objected until now.

"Philip Morris has done much worse than we did and we never thought it was illegal or went after them," Mr. Crestana said.

If the packages are similar, the prices are not. Souza Cruz is selling its brand cheaper—50¢ for the 90mm size, compared with 67¢ for PM's Galaxy.

Souza Cruz advertising for Free also irks Philip Morris.

While Galaxy is always advertised as "The intelligent decision," the Free ads aired in test markets say, "You don't have to be intelligent to choose lower tar and nicotine. It's a question of good sense and paying to find out," (a reference to the lower price). Standard, Ogilvy & Mather handles the Free campaign.

Souza Cruz' market dominance is such that the only segment it has failed to dominate is the low-tar and low-nicotine area, which accounts for only 3.65% of all cigaret sales. Two heavily ad-supported BAT brands in the segment—Advance and Columbia Ultra Lights—have flopped.

Over-all, BAT has 79% of a cigaret market that has shrunk by 9.4% since 1980 to 129.2 billion cigarets last year.#

Third World drug ad code proposal stalled by U.S.

By JOHN PARRY

GENEVA—The U.S. and other Western nations have beaten back an attempt by Third World countries to involve the U.N. Conference on Trade and Development in the policing of pharmaceutical advertising.

At UNCTAD's board meeting earlier this month, a group of more than 100 developing countries proposed a resolution calling for UNCTAD to begin debating criticism of the International Federation of Pharmaceutical Manufacturers' in-house code of conduct, which critics say is too soft.

The primary criticism of the code comes from several consumer groups that want all pharmaceutical advertising banned, except at point-of-purchase (AA, March 5).

The board decided to defer consideration of the proposal until the fall session after the U.S. delegation and other Western nations argued that the proposal was both unnecessary and wasteful.

The question of a code of conduct for pharmaceutical manufacturers in the field of advertising in the Third World has been under discussion at the U.N.'s World Health Organization for many years and is a featured item on the agenda of the World Health Organization Assembly here in May.

A lack of definitive action by WHO prompted some Third World countries to try to switch the debate to UNCTAD, where they have a built-in voting majority.

The U.S. and other Western countries have argued that there is no need for an international code, similar to the one adopted by WHO on infant formula in 1980.

Gordon Streeb, head of the U.S. delegation to UNCTAD and a deputy assistant secretary of state, has argued that because UNCTAD's primary purpose is aiding the economic development of the Third World, the body should not get involved in matters which do not concern it.

Mr. Streeb also said the U.S. feels that WHO does an adequate job in the field.#

world news roundup

(Continued from Page 3)

Convenient Food Mart this fall (AA, March 19). More than 300 Spar stores already have converted to late-night operations.

SYDNEY—Union Carbide Corp. has moved its $2 million home products account to SSC&B:Lintas from Leo Burnett Co.

MADRID—S.C. Johnson & Son has dropped Delvico/DFS from its $1.2 million wax account. No replacement has been named.

MELBOURNE—Monahan Dayman Adams subsidiary MDA Mattingly has won $17 million in new business from Myer Emporium retailers, adding to its $11 million Myer account in two Australian states. Ted Bates' subsidiary George Patterson and Market Force lost out.

"Politicians are not traveling circuses; they influence human life more than a pack of cigarets."

— Coordt von Mannstein

"We told Mitterrand that France had abandoned the age of having and had entered the age of being."

— Jacques Seguela

European admen think Reagan mismanages his campaign image

By DENNIS CHASE

NEW YORK—The people who shape the images of European heads of state believe President Ronald Reagan is mismanaging his image in the U.S.

Jacques Seguela, president of Roux Seguela Cayzac & Goudard in France and French President Francois Mitterrand's advisor, said, "He is making a terrible mistake. He is agitating people. He should run the same campaign that we ran for Francois Mitterrand, whom we called *'la force tranquille'* [the calming force]. All the people in the U.S. are upset. The contrary of upset is *force tranquille*. Ronald Reagan can be *force tranquille*."

'84 Marketing the Candidates

Mr. Seguela, the enfant terrible of French advertising, eschews political affiliations and says the same advice he gave to upset Socialist victor Mr. Mitterrand in 1981 applies to the right-wing campaign of President Reagan.

President Reagan should confine most of his public comments to home and family issues, said Mr. Seguela, in contrast to Democratic presidential candidate Gary Hart, who "is a contrarian. . .All the talk about new ideas. You don't become President that way."

As for President Reagan, the first thing Mr. Seguela would advise him to do is change what he wears.

The President's wardrobe, he said, should feature more pastel colors and more cowboy hats.

"He is the U.S. cowboy, and he should be that all the time, with his wife on the ranch," says Mr. Seguela, who convinced Mr. Mitterrand to change tailors and wear "softer" clothing.

West German Chancellor Helmut Kohl's image maker, Coordt von Mannstein, says Mr. Reagan should contrive to be viewed as the underdog.

Chancellor Kohl, in his surprise victory last year, "liked nothing better than to go down in the polls so he could fight his way back," said Mr. von Mannstein, chairman of von Mannstein Gruppe advertising.

Unlike President Mitterrand, Chancellor Kohl refused to change his appearance, such as his hair style, in his successful election campaign, says Mr. von Mannstein.

However, Chancellor Kohl did allow his advisors to blow up his campaign posters to gigantic proportions, to emphasize his nickname, "The Black Giant."

"Our strategy was to make everything about him the greatest, and to give him the image of a winner," Mr. von Mannstein told a special International Advertising Assn. meeting held earlier this month.#

You can tell where and how your competitors will move next!

The PARC Monitoring Services:

Give you an immediate insight to your competitors strategies.
You will receive timely comprehensive monthly product-reports covering all the brands advertising in the media of ***Saudi Arabia, Kuwait, all the Gulf States, Jordan, Iraq, Egypt, Lebanon and North Yemen.***

Update your knowledge of the Arab markets, call us today...

PARC
PAN ARAB RESEARCH CENTER W.L.L.
A Member of Gallup International
Head Office: P.O. Box 921, Safat Kuwait
Tel: 2442100 Telex: 22901 PACC KT

French say okay to fm radio spots

By PHIL HILL

PARIS—The recent announcement by French President Francois Mitterrand that local radio stations on the fm band would be able to carry advertising will have a dramatic effect on ad agencies here, sources say (AA, April 9).

In making the announcement, Mr. Mitterrand said he hoped the change would help bail out France's financially ailing radio industry.

Many of the 900 stations in France have been living a hand-to-mouth existence for the last two years, deprived of legal advertising and forced to make under-the-table deals with advertisers.

Weeks before the announcement, some agencies, including Roux Seguela Cayzac & Goudard and Havas Conseil, had set up organizations known as ad *regies* to represent groups of radio stations and help find advertisers.

According to Jacques Hebert, vp, Lintas:Paris, local radio stations will initially attract local businesses and ads aimed at young people for such products as movies, American beer and blue jeans.

Mr. Mitterrand is believed to have been influenced by advice from Jacques Seguela, who ran the president's election campaign in May, 1981, and by his communications advisor, Claude Marti, a former TBWA executive and former president of the French Assn. of Advertising Agencies.#

International briefs

P&G hoping for new market with Top Job

SCHWALBACH, GERMANY—Procter & Gamble Co. is hoping to create a new market that could reach $40 million with its new laundry "booster" sheet that is called Top Job.

The new product, which is dropped in washing machines to improve the cleaning properties of detergents, was launched two weeks ago in Germany in a $5 million campaign via Benton & Bowles, Frankfurt (AA, April 9).

The launch was limited to Germany, but the product is being test-marketed in France, Austria and Switzerland as a prelude to a rollout all over Europe. It is produced in the U.K. and the package has labeling in English, French, German and Italian.

The product does not exist in the U.S. and the campaign claims the dissolvable sheets get laundry as clean as if it had been boiled. Many German housewives boil their laundry because they are not convinced that washing machines get clothes clean enough.#

Anti-smokers seek commercial status

SYDNEY—An antismoking group known for defacing outdoor tobacco advertising in Australia and New Zealand wants to register its name as a business.

But the group, known as BUGA UP (Billboard Utilizing Graffitists Against Unhealthy Promotions), has met opposition from the New South Wales Corporate Affairs Commission.

The commission has refused to process the group's application, ruling that its name is "offensive to the public" and "suggestive of an illegal activity."

BUGA UP says it will try again.#

Speculation rife over post-1997 Hong Kong

HONG KONG—Ever since Jardine, Matheson & Co., Hong Kong's most venerable trading company, decided to transfer its legal offices from this British Crown colony to Bermuda, rumors have been flying that other major companies might follow suit.

The talk is precipitated by concern over Britain's ability to secure an agreement with China over Hong Kong's capitalist future when the U.K.'s territorial lease expires in 1997.

Lately, the *Asian Wall Street Journal* has been mentioned as a possible candidate to move its printing operations, but newspaper executives have denied such plans.

Managing editor Mike Malloy said there was "absolutely no truth" to the rumors. He speculated that the talk was fueled by speculation about the *Journal's* recent $4 million investment in new printing, communications and office equipment was made in anticipation of a move.

"The equipment is being installed in Hong Kong," Mr. Malloy said. "It is not going into Singapore."#

'Cosmo'

(Continued from Page 55)

azine to *Metropolis* after rival *Cosmopolitan* took him to court complaining of the similarity in the two titles.

The name change came after a Swiss court banned distribution of the March *Metropolitan* in Switzerland, but not before the controversy created valuable free publicity for Mr. Czerny's 4-month-old magazine.

The "copycat" problem represents one of the pitfalls awaiting U.S. magazine publishers who are considering licensing their publications overseas.

So far, that hasn't daunted *Cosmopolitan*, with 24 foreign licensed editions in nine languages, from forging ahead internationally.

Since its arrival in Germany in 1980, *Cosmopolitan* has become well established here. Most agree the Hearst Corp. publication appeared on the market as values were changing among German women and that its editorial formula coincided with their reevaluation of their societal roles.

Since then, paid circulation has climbed to 400,000, with a quarter of those readers gained last year. In addition, ad pages in 1983 more than doubled compared with 1982, for a total of 760 pages.

Up against the might of the Hearst Corp., along with Attika Verlag, the Zurich-based publisher of *Cosmopolitan*, Mr. Czerny decided to switch rather than fight.

Mr. Czerny acknowledged there was a strong similarity between *Metropolitan* and *Cosmo* in the first three issues, and that he actually hoped for a fight to generate publicity.

Now he says he's out to corner a part of the market that he believes has become disenchanted with his competitor.

"With the new title, we want to move away from *Cosmopolitan*," he says. "Not out of fear, but because we have discovered there is a very large target group that wants a magazine that is not as sexist and feminist as *Cosmopolitan*."

Sources in the editorial offices of *Cosmopolitan* say *Metropolitan's* appearance initially fooled some *Cosmo* readers.

Before the name change, $346,000 was spent on promoting early issues of *Metropolitan*. But Mr. Czerny says the ad budget was not wasted because the new title only slightly alters the magazine's cover appearance.

He also claims a paid circulation of more than 200,000, a figure that will be audited by Germany's circulation authority next month.

Agency sources agree the market is ripe for alternatives to the classic women's titles.#

Licensing

(Continued from Page 55)

Hong Kong and other locations in the Far East, the fastest growing economic region in the world. It's also the gateway to China, the biggest prize.

A licensee operates much as a restaurant franchisee does: He agrees to pay a royalty for use of a name and concept and is subject to controls by the U.S. publisher, who independently checks whether the standards are being met.

Licensees use some local content, but devote most editorial space to stories from the U.S. edition. But even these stories are often "localized" by editors in those countries.

"In Latin America an unmarried woman usually lives at home," says Dick Deems, a longtime licensing expert with Hearst Corp. "Obviously, *Cosmopolitan* would have to be adapted for those markets."

Publishers are finding that the difficulty in making sure a foreign licensee maintains the reputation and quality of a U.S. publication is far outweighed by the easy royalties and prospect of offering international advertisers worldwide coverage.

The return on investment (royalty income divided by operating expenses) can be as much as 80%, sources say. A U.S. publisher pays only for monitoring the publication and for additional rights to republish original material. He pays no local editorial expenses.

A five-year contract between *Playboy* and a foreign licensee can bring in as much as several million dollars a year, Mr. Hall says.

With *Playboy's* U.S. circulation and advertising revenue dropping, the publication's sales of 1.7 million a month with its nine foreign editions are increasingly important to Playboy Enterprises.

Now the biggest opportunity facing these publishers is appealing to advertisers who want to run campaigns worldwide.

While *Time* and *Newsweek*, which publish wholly-owned foreign editions with virtually identical editorial content, have picked up many of these ads, so far agencies and advertisers generally have resisted similar arrangements with licensed publications for two reasons. First, they don't want to preempt their local branches from making that decision and, second, advertisers don't want their ads appearing with unfamiliar editorial material.#

Illustration: Yvette M. Haden

FOREIGN AGENCY INCOME REPORT

Strong U.S. dollar cuts back growth

By DENNIS CHASE

The advertising industry's worldwide gross income grew sharply last year, but not when translated into the measuring stick used by U.S. agencies: Greenbacks.

According to ADVERTISING AGE's annual Foreign Agency Income Survey of 895 agencies in 76 countries, gross income for all agencies grew 13%, to $4.16 billion. That compares with 1982's $3.69 billion, restated at 1983 exchange rates.

"Our international billings, which were up 5% in U.S. dollars, would have been up 15% if the effect of the exchange rate was removed," said Steven Kahler, executive vp for finance and administration, BBDO International.

This year's increase—stated in U.S. dollars—also falls short of last year's 27% growth.

Japan's Dentsu held onto its No. 1 worldwide ranking, with $437.7 million in gross income. But its lead over second-place Young & Rubicam fell slightly to a margin of $23.7 million, compared with $26.3 million last year. Both Dentsu's and Y&R's gross income grew by about 9% last year.

In the only change among the top ten agencies, Saatchi & Saatchi Compton Worldwide leapfrogged Leo Burnett Co. into eighth place, with $253.3 million in gross income last year. The agency grew about 36%, and only strong 21% BBDO growth kept the Saatchi brothers from leaping two places.

Grey Advertising, which grew 24% in gross income last year, moved up two places into 13th place in this year's rankings.

In major international markets, growth in gross income—stated in U.S. dollars—was strongest in Germany (up 20%), France (19%), Britain (18%) and South Africa (17%). That compares with a U.S. growth of 10.7% (AA, March 28).

(Contined on Page 58)

Agencies' growth cut back

(Continued from Page 57)

In an Ad Age questionnaire that accompanied this year's survey, agencies were asked what markets are expected to show the best growth rates this year.

Most agencies worldwide believe that computer hardware and software will grow the fastest. European agencies also mention financial services, and many French agencies add cosmetics.

In answer to the question "What is the major problem facing the advertising industry in your country?" British agencies generally cited commission cutting and the growing power of retailers.

French agencies cited increased government control, lack of commercial tv time, nationalization and unemployment. Several mentioned the "de-motivation of entrepreneurs."

German agencies are also concerned about commission cutting, partly spurred by the growing competition of media independents. One agency cited union demands for a 35-hour week.

The few Japanese agencies that volunteered answers to the question generally cited proposed taxes on advertising as their first concern. A new ad tax was the main concern of South African agencies.

In Australia, growing government control was the main issue. In particular, agencies cited the increasingly aggressive Australian Broadcasting Tribunal, which is like the U.S. Federal Communications Commission.

One significant change from previous years: Inflation has receded as an issue except in one region—Latin America.#

This survey was compiled by Ilse Cermak, International department, Advertising Age.

TOP 15 AGENCY WORLD GROUPS

Figures are given in millions ($).

	Agency	Gross income	Billings
1.	Interpublic Group of Cos.[1]	$620.4	$4.14 bill.
2.	JWT Group[2]	479.2	3.20 bill.
3.	Dentsu Inc.	437.7	3.21 bill.
4.	Young & Rubicam	414.0	2.76 bill.
5.	Ted Bates Worldwide	388.0	2.59 bill.
6.	Ogilvy & Mather Intl.	345.8	2.36 bill.
7.	BBDO Intl.	289.0	1.95 bill.
8.	Saatchi & Saatchi Compton	253.3	1.71 bill.
9.	Foote, Cone & Belding[3]	229.4	1.55 bill.
10.	Leo Burnett Co.	216.5	1.48 bill.
11.	Grey Advertising	183.5	1.22 bill.
12.	D'Arcy MacManus Masius	181.1	1.21 bill.
13.	Hakuhodo Intl.	180.2	1.35 bill.
14.	Univas Network[4]	175.0	1.13 bill.
15.	Benton & Bowles	144.3	1.00 bill.

[1]**Interpublic Group of Cos.** a holding company for McCann-Erickson Worldwide, SSC&B Lintas, Marschalk Campbell-Ewald & Dailey Intl. Group. [2]**JWT Group** a holding company whose principal subsidiary is J. Walter Thompson Co. [3]**Foote, Cone & Belding** includes figures for NCK Intl. now part of FCB. [4]**Univas Network** includes the EUROCOM Group and 6 affiliated agencies.

Source: compiled by Advertising Age.

Notes to individual agency listings

ARGENTINA

Advertisers Asociados is part of Saatchi & Saatchi Compton Worldwide.
Cicero/Ted Bates Publicidad billings are AA estimates.
Lautrec Publicidad part of DFS Intl.
Ortiz, Scopesi y Cia. part of Ogilvy & Mather Intl.
David Ratto affiliated with BBDO Intl.
Young & Rubicam de Argentina billings are AA estimates.

AUSTRALIA

Angus Goldfinch Stagoll is part of Fortune Communication Holdings. The office opened in 1983.
The Campaign Palace's gross income figures for 1983 and 1982 are AA estimates.
Clemenger Australia part of BBDO Intl. Figures include data for agency Magnus Nankervis & Curl, also part of BBDO Intl.
D'Arcy MacManus Masius also has offices in Adelaide, Brisbane, Melbourne and Perth.
Dancer Fitzgerald Sample Australia office opened in 1983. Fortune Communication Holdings holds 50% equity in DFS Australia.
Forbes Macfie Hansen gross income figures for 1983 and 1982 are AA estimates.
Hammond Advertising part of Fortune Communication Holdings.
Hayes Cowcher-Dailey Ltd. part of the Interpublic Group of Cos.
Meridien Advertising part of Ogilvy & Mather Intl.
Mojo Australia part of D'Arcy MacManus Masius
Monahan Dayman Adamz Group consists of MDA Mattingly, Monahan Jayman Adams (NSW), MDA (VIC), MDA (WA), MDA Direct, MDA Yardley Logan, MDA Lovitt Ashwood, Chandler Hambleton Mier and Foster Nunn Loveder.
George Patterson part of Ted Bates Worldwide.
Pope & Kiernan & Black part of Kenyon & Eckhardt Intl.
Saatchi & Saatchi Compton, formerly Gough Waterhouse.
Scali, McCabe, Sloves part of Ogilvy & Mather Intl.
Schofield Sherbon Baker part of Fortune Communication Holdings.
The Weston Co. part of Fortune Communication Holdings.
Young & Rubicam does not report billings. Figures are AA estimates. Y&R Australia reports consolidated gross income for Y&R, Burson-Marsteller and Young & Rubicam Coudrey (formerly Coudrey Dailey) which merged December, 1983, with Y&R.

AUSTRIA

Die Sieber Werbungsgesellschaft affiliated with Saatchi & Saatchi Compton Worldwide.
Dorland Advertising part of DFS Intl.
Dr. Kossdorff & Partner part of the Needham, Harper & Steers network.
MMS-Werbeagentur gross income estimated by AA.
Team Werbeagentur part of BBDO Intl.
Young & Rubicam does not report billings. Figures are AA estimates.

BELGIUM

KHD Ogilvy & Mather billings are AA estimates.
MarkCom S.A. affiliated with Saatchi & Saatchi Compton Worldwide.
Marsteller International S.A. billings figures for 1983 and 1982 are AA estimates.
Partner part of Saatchi & Saatchi Compton Worldwide
Ted Bates S.A. 1983 figures include those of S.A. Coerten, which is responsible in part for the substantial increase in gross income and billings from 1982 to 1983.
VVL/BBDO was founded in September, 1983.
Young & Rubicam Belgium does not report billings. Figures are AA estimates. Y&R Belgium gross income is a consolidation of Y&R, Wunderman, Ricotta & Kline, Marsteller, Burson-Marsteller and nine months of Cato Yasumura & Behaghel, which was sold in October, 1983.

BRAZIL

Alcantara Machado, Periscinoto also has offices in Brasilia.
CBBA-Castelo Branco e Associados Propaganda purchased in March 1984 GFM/Propeg, Salvador.
Denison S/A part of Ted Bates Worldwide.
Duailibi, Petit, Zaragoza Propaganda offices in Rio de Janeiro, Brasilia and Porto Alegre.
GTM&C is affiliated with Kenyon & Eckhardt.
Norton Publicidade affiliated with the Univas agency network. Gross income figures for 1983 are agency estimates.
Oliveira, Murgel Comunicacao associated with Kenyon & Eckhardt Intl.
Publicidade Siboney is associated with NCK, an international network in Latin America which merged into Foote, Cone & Belding Intl. Jan., 1984.
Salles/Inter-Americana de Publicidade is affiliated with Benton & Bowles Intl.
SGB Publicidade e Promocoes is part of Saatchi & Saatchi Compton Worldwide.
Standard, Ogilvy & Mather Publicidade also has offices in Recife and Porto Alegre.
Unidade Inter-Americana is part of the Salles/Inter-Americana group, which has a 43.2% interest in Unidade. Salles, in turn, is affiliated with Benton & Bowles Intl.
Young & Rubicam do Brasil does not report billings. Figures are AA estimates. Y&R Brasil reports consolidated gross income for Cato Johnson & Burson-Marsteller.

BRITAIN

Bastable Dailey gross income estimated by AA.
Boase Massimi Pollitt in late 1983 bought back its minority interest held by Univas, Paris.
Butler Dennis Garland & Partners Ltd. part of Kenyon & Eckhardt Intl.
Colman RSCG & Partners associated with Roux, Seguela, Cayzac & Goudard group in France.
Dorland Advertising became part of Dorland/DFS Intl., a pan-European consortium based in London March,

(Continued on Page 75)

WORLD'S TOP 50 AD AGENCIES IN 1983

Figures, shown here in millions ($), are based on total equity interest in foreign shops.

	Agency	Gross income	Billings
1.	Dentsu	$437.7	$3.21 bill.
2.	Young & Rubicam[1]	414.0	2.76 bill.
3.	Ted Bates Worldwide[2]	388.0	2.59 bill.
4.	J. Walter Thompson Co.[3]	378.4	2.52 bill.
5.	Ogilvy & Mather[4]	345.8	2.36 bill.
6.	McCann-Erickson Worldwide	298.8	1.99 bill.
7.	BBDO Intl.[5]	289.0	1.95 bill.
8.	Saatchi & Saatchi Compton Worldwide[6]	253.3	1.71 bill.
9.	Leo Burnett Co.	216.5	1.49 bill.
10.	Foote, Cone & Belding[7]	208.4	1.41 bill.
11.	Doyle Dane Bernbach[8]	199.0	1.32 bill.
12.	SSC&B:Lintas	197.1	1.32 bill.
13.	Grey Advertising	183.5	1.22 bill.
14.	D'Arcy MacManus Masius	181.1	1.21 bill.
15.	Hakuhodo Intl.	180.2	1.35 bill.
16.	Benton & Bowles	144.3	1.00 bill.
17.	Marschalk Campbell-Ewald	133.0	886.8
18.	EUROCOM/Univas	125.2	852.3
19.	Dancer Fitzgerald Sample	113.1	726.1
20.	‡Marsteller Inc.	99.6	664.1
21.	N W Ayer Inc.	97.4	650.0
22.	Needham, Harper & Steers	94.2	631.9
23.	Wells, Rich, Greene	92.7	608.5
24.	‡William Esty Co.	84.8	565.0
25.	Publicis Intermarco-Farnei	82.1	553.8
26.	Bozell & Jacobs	74.4	557.(
27.	Kenyon & Eckhardt	60.5	392.2
28.	Daiko Advertising	59.8	472.4
29.	Ketchum Communications	55.2	368.3
30.	Cunningham & Walsh	52.7	366.0
31.	‡Compton Advertising	50.8	360.3
32.	Tokyu Advertising	50.5	391.6
33.	Dai-Ichi Kikaku	49.2	349.7
34.	Backer & Spielvogel	45.0	300.0
35.	HBM/Creamer Inc.	43.5	290.9
36.	‡Campbell-Mithun	42.8	285.3
37.	Yomiko Advertising	39.1	239.7
38.	MPM Propaganda	37.6	150.4
39.	Geers Gross	37.0	250.0
40.	Alcantara Machado, Periscinoto Comunicacoes	36.4	145.6
41.	Roux Seguela Cayzac & Goudard[9]	35.6	237.3
42.	‡Scali, McCabe, Sloves	35.1	230.8
43.	TBWA	35.0	237.2
44.	Ross Roy Inc.	34.1	227.0
45.	Della Femina, Travisano & Partners	30.8	205.0
46.	‡Belier Group	30.1	201.0
47.	Asahi Kokoku-sha Co.	30.0	194.0
48.	Laurence, Charles & Free	29.3	195.0
49.	Leber Katz Partners	29.2	251.0
50.	Tatham-Laird & Kudner	27.0	224.0

Included in figures: [1]**Young & Rubicam:** Hutchins/Y&R; Sive Associates; Y&R/Zemp; Creswell, Munsell, Fultz & Zirbel; Rives, Smith, Baldwin & Carlberg; Marsteller Inc. (incl. Marsteller Advertising and Burson-Marsteller); Cato Johnson; CYB; Y&R Special Markets; Chapman Direct Marketing; Stone & Adler, Sudler & Hennessey; Wunderman, Ricotta & Kline; DYR (joint venture with Dentsu, Japan). [2]**Ted Bates Worldwide:** William Esty Co.; AC&R Advertising; Campbell-Mithun; Diener/Hauser/Bates; McDonald & Little; Sawdon & Bess; Stern Walters/Earle Ludgin. [3]**J. Walter Thompson Co.:** Brouillard Communications, J. Walter Thompson USA; Thompson Recruitment Advertising. [4]**Ogilvy & Mather:** Ogilvy & Mather Partners; Ogilvy & Mather Direct Response; Ogilvy & Mather PR; Ogilvy & Mather Special Markets; Sussman & Sugar; Ogilvy & Mather Hawaii; Scali, McCabe, Sloves; Euramerica Translations; Cole & Weber; A. Eicoff & Co.; Dudley-Anderson-Yutzy. [5]**BBDO Intl.:** BBDO Direct, BDA/BBDO; Blair Advertising; GM DuBois Corp.; Caravetta Allen Kimbrough/BBDO; Frank J. Corbett Inc.; Franklin Spier Inc.; Lavey/Wolff/Swift; MARCOA Direct; Quinn & Johnson/BBDO; RC Communications; TELERx Marketing; Tracy-Locke/BBDO; Waring & LaRosa. [6]**Saatchi & Saatchi Compton Worldwide:** Compton Advertising; Cadwell Davis Partners; Rumrill-Hoyt; Kiemtner Advertising; Mayo Infurna Design; Fairfax Advertising; Hoffman, York & Compton. [7]**Foote, Cone & Belding:** Wahlstrom & Co.; Lewis, Gilman & Kynett; Albert Frank-Guenther Law; Deutsch, Shea & Evans; Carl Byoir Associates. [8]**Doyle Dane Bernbach:** Milici/Valenti Advertising; Cargill Wilson & Acree; DDB Group Two; Fletcher/Mayo Associates; Bernard Hodes Advertising; Rapp & Collins; Barickman Advertising; Kallir, Philips, Ross; ECOM; Director's Studio. [9]**Roux Seguela Cayzac & Goudard Group:** Includes agencies in the U.K., Germany, Spain, Belgium, Switzerland, Netherlands, Italy and Ivory Coast.

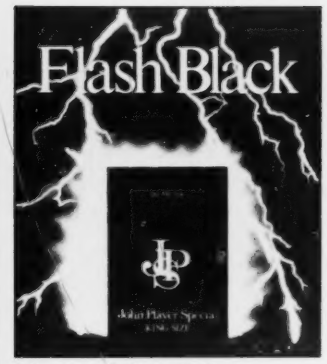
‡Agency's financial data also included in parent company's totals on this chart. See footnotes for agency ownership.

Source: compiled by Advertising Age.

Agency	City	Gross income ($000) 1983	Gross income ($000) 1982	Per cent change	Billings ($000) 1983	Billings ($000) 1982	Gross income 1983 FOREIGN CURRENCY	Billings 1983 FOREIGN CURRENCY	Employes 1983	Employes 1982	Per cent change	offices
ARGENTINA											**Exchange rate: 0.0850 peso**	
J. Walter Thompson Argentina	Buenos Aires	2,588.5	4,519.2	N/A	14,069.6	23,756.9	Ps30,098.6	Ps165,524.9	135	122	11.0	1
Gowland Publicidad	Buenos Aires	2,149.1	590.9	N/A	8,596.7	2,462.2	25,284.0	101,137.0	75	96	22.0	1
Casares, Grey & Asociados	Buenos Aires	2,068.3	1,820.0	N/A	7,970.0	13,875.0	24,333.0	93,767.0	70	79	– 11.0	1
Ricardo de Luca Publicidad	Buenos Aires	2,059.8	2,771.4	N/A	15,430.0	13,731.8	24,120.0	160,800.0	107	107	0.0	1
David Ratto S.A.	Buenos Aires	1,955.0	2,521.0	N/A	9,299.0	10,471.0	23,000.0	109,400.0	75	67	12.0	1
Ortiz Scopesi/Ogilvy & Mather	Buenos Aires	1,520.8	2,466.9	N/A	8,551.7	14,608.7	17,891.4	100,608.7	94	86	9.0	1
Lautrec Publicidad	Buenos Aires	1,509.8	1,637.4	N/A	5,957.7	7,829.0	17,761.8	70,091.0	71	55	29.0	1
Solanas Ayer	Buenos Aires	1,224.0	1,215.0	N/A	6,919.0	6,709.0	14,398.0	81,406.0	N/A	N/A	N/A	1
McCann-Erickson S.A. de Publicidad	Buenos Aires	1,001.0	865.0	N/A	6,677.0	5,770.0	11,772.0	78,519.0	50	36	39.0	1
Pragma/FCB	Buenos Aires	944.6	1,586.0	N/A	6,300.0	10,578.6	11,113.3	74,125.5	62	58	7.0	1
Lintas Limitada S.A.	Buenos Aires	884.0	1,440.0	N/A	7,577.0	10,198.0	10,396.0	89,144.0	46	39	18.0	1
Leo Burnett-Sagarra	Buenos Aires	675.0	973.0	N/A	4,502.0	6,488.0	7,940.0	52,960.0	47	31	52.0	1
Young & Rubicam de Argentina	Buenos Aires	513.0	1,625.0	N/A	3,422.0	10,838.0	6,033.0	40,258.8	26	33	21.0	1
Cicero/Ted Bates Publicidad	Buenos Aires	501.2	377.9	N/A	3,698.5	1,660.4	5,896.0	49,408.0	40	31	29.0	1
Johnson/Benton & Bowles	Buenos Aires	494.2	602.8	N/A	2,909.1	2,741.6	5,814.0	34,225.0	33	18	83.0	1
The Advertisers Asociados	Buenos Aires	312.0	289.8	N/A	1,327.2	1,931.9	3,670.2	15,614.5	30	20	50.0	1

* With Argentinian agencies, AA altered its procedure of determining an agency's "real growth" (applying 1983 exchange rate to 1982 returns) because it primarily shows the impact of inflation in that economy. Dollar figures for 1982 are based on the average annual exchange rate for that year.

AUSTRALIA											**Exchange rate: 0.9085 A dollar**	
George Patterson	Sydney	28,000.0	25,000.0	12.0	182,000.0	165,000.0	A$31,000.0	A$200,000.0	420	430	– 2.0	4
Clemenger Australia	Melbourne	24,205.3	22,675.9	7.0	161,449.3	151,248.2	26,643.1	177,709.7	472	430	10.0	12
D'Arcy MacManus Masius	Sydney	16,952.8	15,065.5	13.0	114,394.9	100,067.8	18,660.2	125,916.2	317	350	– 9.0	5
Monahan Dayman Adams Group	Melbourne	16,385.4	11,914.9	38.0	102,408.4	74,468.3	18,035.6	112,722.6	332	242	37.0	14
Ogilvy & Mather (Australia)	Melbourne	14,860.0	12,108.5	23.0	99,111.9	80,764.7	16,356.0	109,094.0	358	320	12.0	9
USP Needham Australia	Sydney/Melbourne	14,324.3	12,776.2	12.0	95,574.2	83,582.0	15,767.0	105,200.0	257	240	7.0	5
McCann-Erickson (Australia)	Sydney	13,285.0	12,015.0	11.0	88,611.0	80,140.0	14,622.0	97,529.0	293	265	11.0	N/A
Leo Burnett Ltd.	Sydney	11,457.1	10,944.7	5.0	76,418.5	72,819.0	12,611.0	84,115.0	277	296	– 6.0	6
Fortune Communication Holdings	Sydney	10,902.0	8,585.3	27.0	68,137.5	45,425.0	12,000.0	75,000.0	215	165	30.0	5
J. Walter Thompson Australia	Sydney	9,261.7	8,177.0	13.0	62,635.5	54,545.1	10,194.5	68,943.4	194	191	2.0	3
Young & Rubicam Ltd.	Sydney	7,635.0	6,245.0	22.0	50,924.3	41,653.4	8,390.0	56,053.1	130	129	0.8	4
Foote, Cone & Belding Australia	Sydney	6,651.5	5,973.0	11.0	44,365.7	39,873.4	7,321.4	48,834.1	101	104	– 3.0	3
Lintas (Australia)	Sydney	5,342.0	5,373.0	– 1.0	40,562.0	35,001.0	5,880.0	44,647.0	99	107	0.7	3
Schofield Sherbon Baker Ltd.	Sydney	5,000.0	4,270.0	17.0	31,800.0	25,438.0	5,500.0	35,000.0	105	84	25.0	4
Connaghan & May Ayer	Sydney	4,255.0	3,612.3	18.0	24,706.7	22,319.9	4,683.5	27,195.0	66	65	0.2	2
Saatchi & Saatchi Compton	Melbourne/Sydney	4,048.3	2,375.8	70.0	27,315.0	13,501.5	4,456.0	30,066.0	35	34	0.3	2
Mojo Australia	Sydney	3,833.0	2,665.1	44.0	25,249.9	17,489.7	4,219.0	27,793.0	N/A	N/A	N/A	1
Doyle Dane Bernbach/Berry Currie	Sydney	3,739.4	3,090.0	21.0	21,827.0	18,691.0	4,116.0	24,025.0	78	77	1.0	4
Forbes Macfie Hansen	Sydney	3,338.7	1,976.0	83.0	22,258.3	13,173.3	3,389.4	24,500.0	41	40	3.0	N/A
Hertz Walpole Campbell-Ewald	Sydney	2,507.0	2,607.0	– 4.0	16,722.0	17,389.0	2,759.0	18,403.0	27	34	– 21.0	N/A
Grey & Murray Evans Advertising	Sydney	2,366.1	1,537.5	54.0	15,782.0	10,255.4	2,604.4	17,371.5	45	50	– 10.0	1
The Campaign Palace	Sydney	2,295.0	1,635.3	40.0	15,300.0	10,902.0	2,526.1	18,000.0	38	N/A	N/A	2
Buchanan Bullpitt & Grey	Sydney	2,291.6	1,640.8	40.0	15,285.0	10,943.8	2,522.4	16,824.4	37	31	19.0	1
Pope & Kiernan & Black	Sydney	1,973.8	1,972.2	0.1	13,301.6	12,646.6	2,172.6	14,641.2	29	44	– 34.0	1
Hayes Cowcher-Dailey Ltd.	Melbourne	1,976.0	1,640.8	17.0	10,424.0	9,188.6	2,109.0	11,474.0	36	33	9.0	2
Dancer Fitzgerald Sample Australia	Sydney	1,520.0	N/A	N/A	9,990.0	N/A	1,670.0	11,000.0	28	N/A	N/A	2
The Weston Co.	Sydney	1,462.7	1,158.3	26.0	9,993.5	6,486.7	1,610.0	11,000.0	29	19	53.0	1
Harris Robinson Courtenay	Sydney	1,453.1	1,269.7	14.0	9,620.4	7,935.0	1,599.4	10,589.3	32	35	– 9.0	1
Meridian Advertising (Australia)	Melbourne	1,449.0	500.1	190.0	9,664.9	3,335.7	1,595.0	10,638.3	25	22	14.0	2
Yared Perry Paton	Melbourne	1,329.1	787.7	69.0	7,851.3	4,922.3	1,463.0	8,642.0	24	17	41.0	2
Hammond Advertising	Sydney	1,226.5	763.1	61.0	7,270.0	4,088.3	1,350.0	8,000.0	27	18	50.0	2
Moffatt Sharp Advertising	Melbourne	1,102.1	1,026.0	7.0	5,466.0	5,253.6	1,213.1	6,016.5	26	26	0.0	1
Scali, McCabe, Sloves	Melbourne	1,081.0	427.0	153.0	6,360.0	2,725.0	1,190.0	7,000.0	17	13	31.0	1
Angus Goldfinch Stagoll Advertising	Melbourne	386.1	N/A	N/A	2,271.2	N/A	425.0	2,500.0	10	N/A	N/A	2
AUSTRIA											**Exchange rate: 0.0568 schilling**	
Lintas Werbeagentur	Vienna	2,490.4	2,221.7	12.0	18,392.5	15,832.8	Sch43,844.2	Sch323,812.0	42	40	5.0	1
McCann-Erickson	Vienna	2,333.0	2,041.0	14.0	15,561.0	13,613.0	41,059.0	273,864.0	44	41	7.0	N/A
GGK Wien	Vienna	1,880.0	1,721.0	9.0	12,553.0	11,474.0	33,100.0	221,000.0	31	25	24.0	1
Demner & Merlicek	Vienna	1,677.3	1,295.0	30.0	11,189.6	8,690.4	29,530.0	197,000.0	29	23	26.0	1
J.Walter Thompson	Vienna	1,626.0	1,461.0	11.0	10,837.0	9,742.0	28,619.0	190,802.0	39	38	3.0	1
MMS-Werbeagentur	Linz	1,607.0	1,431.0	12.0	11,246.0	9,997.0	28,300.0	198,000.0	26	28	– 7.0	1
Ogilvy & Mather Wien	Vienna	1,320.1	1,051.8	26.0	9,676.9	7,990.1	23,241.4	170,367.8	30	24	25.0	1
Team Werbeagentur	Vienna	1,289.4	959.9	34.0	8,576.8	6,418.4	22,700.0	151,000.0	20	17	18.0	1
Werbeagentur Wirz	Vienna	1,280.0	971.3	32.0	10,530.0	8,150.8	22,600.0	185,300.0	15	14	7.0	1
Hager Gesellschaft	Vienna	1,250.0	1,210.0	3.0	11,920.0	11,070.0	22,100.0	210,000.0	25		– 7.0	1
Werbetechnisches Studio	Vienna	1,204.2	1,170.0	3.0	8,236.0	8,009.0	21,200.0	145,000.0	26	25	4.0	1
Dr. Puttner & Bates	Vienna	1,158.0	726.0	60.0	7,724.0	4,845.0	20,400.0	136,400.0	18	12	50.0	1
Young & Rubicam	Vienna	1,137.0	977.0	16.0	7,584.0	6,517.0	20,023.0	133,521.1	24	23	4.0	
R.W. Eggert	Vienna	983.0	875.0	12.0	5,629.0	5,101.0	17,300.0	99,100.0	14	14	0.0	1
D'Arcy MacManus Masius	Vienna	976.0	986.3	– 1.0	6,599.0	6,525.0	17,190.0	116,170.0	20	20	0.0	1
Die Sieber Werbungsgesellschaft	Vienna	967.4	835.0	16.0	9,121.6	9,071.0	17,032.0	160,591.2	25	23	9.0	1
Dorland Advertising	Vienna	937.2	886.0	6.0	5,452.8	4,373.6	16,500.0	96,000.0	10	10	0.0	1
NCK/Austria	Vienna	935.0	1,046.9	– 11.0	6,240.0	6,979.4	16,460.0	122,876.0	N/A	N/A	N/A	N/A
Weinberger Werbehaus	Vienna	903.0	903.0	N/A	6,248.0	5,964.0	15,900.0	110,000.0	18	19	– 5.0	1
Intermarco-Farner Werbeagentur	Vienna	843.5	765.7	10.0	7,015.0	6,049.0	14,850.0	123,500.0	20	19	5.0	1
Grey Austria	Vienna	653.2	608.6	7.0	5,793.6	4,941.6	11,500.0	102,000.0	17	16	6.0	1
Dr. Kossdorff & Partner	Vienna	375.0	N/A	N/A	2,500.0	N/A	6,602.1	44,015.0	8	N/A	N/A	1
Campbell-Ewald Werbeagentur	Vienna	63.0	59.0	7.0	420.0	394.0	1,114.0	7,430.0	1	1	0.0	N/A



Sharps Advertising
London, England

Harris Robinson Courtenay Advertising
Sydney, Australia

MPM Propaganda
Sao Paulo, Brazil

Agency	City	Gross income ($000) 1983	Gross income ($000) 1982	Per cent change	Billings ($000) 1983	Billings ($000) 1982	Gross income 1983 FOREIGN CURRENCY	Billings 1983 FOREIGN CURRENCY	Employes 1983	Employes 1982	Per cent change	offices
BAHRAIN											**Exchange rate: 2.65 dinar**	
Madco Bahrain	Bahrain	627.0	618.0	1.0	2,800.0	2,600.0	Bdin236.6	Bdin1,056.7	N/A	N/A	N/A	1
BARBADOS											**Exchange rate: 0.4980 B dollar**	
Corbin Compton Ltd.	Bridgetown	1,247.7	1,093.3	14.0	7,671.1	7,087.2	B$2,505.5	B$15,403.9	43	46	– 7.0	3
Smith & Oxley Advertising	Belleville	482.9	301.8	60.0	2,418.4	2,315.2	969.7	4,856.0	22	19	16.0	1
BELGIUM											**Exchange rate: 0.0201 franc**	
Young & Rubicam Belgium	Brussels	6,210.0	5,207.0	19.0	41,421.0	34,731.0	BF308,948.0	BF2.06 bill.	102	124	– 18.0	4
McCann-Erickson S.A.	Brussels	4,756.0	4,144.0	15.0	31,723.0	27,640.0	236,596.0	1.60 bill.	113	100	13.0	1
HHD Ogilvy & Mather	Brussels	4,572.2	4,146.5	10.0	30,500.0	27,600.0	227,470.7	1.50 bill.	99	101	– 2.0	N/A
Lintas:Brussels	Brussels	4,112.0	3,581.0	15.0	27,424.0	23,887.0	204,558.0	1.36 bill.	77	73	5.0	1
Benton & Bowles S.A.	Brussels	3,652.0	3,147.0	16.0	24,359.0	20,990.0	181,700.0	1.21 bill.	85	83	2.0	1
Ted Bates S.A.	Brussels	3,028.0	1,156.0	N/A	14,501.7	8,137.0	150,651.0	721,476.0	63	60	5.0	2
J. Walter Thompson S.A.	Brussels	3,018.0	2,661.2	13.0	20,120.1	17,745.5	150,150.0	1.00 bill.	52	56	– 7.0	1
Troost Campbell-Ewald S.A.	Brussels	2,986.0	2,257.0	32.0	19,917.0	15,054.0	148,524.0	990,655.0	60	51	18.0	1
Dechy Univas S.A.	Brussels	2,954.7	2,923.0	1.0	19,707.8	19,488.0	147,000.0	980,490.0	64	63	2.0	
D'Arcy MacManus Masius	Brussels	2,909.5	2,446.0	19.0	19,406.0	16,250.0	144,752.0	965,494.0	62	55	13.0	1
VVL/BBDO	Brussels	2,750.3	N/A	N/A	18,335.5	N/A	136,832.0	912,214.0	56	N/A	N/A	1
Marsteller International S.A.	Brussels	2,462.0	2,174.0	13.0	16,422.0	14,501.0	122,488.0	817,015.0	53	51	4.0	1
Impact-FCB Belgium	Brussels	2,365.0	1,723.0	37.0	15,780.0	11,492.0	117,662.0	785,068.0	49	46	6.0	1
S.A. Intermarco-Farner	Brussels	2,340.0	1,850.0	26.0	15,601.0	12,342.8	116,364.0	776,145.0	50	46	9.0	1
Doyle Dane Bernbach S.A.	Brussels	1,949.0	1,625.0	20.0	13,000.0	10,834.0	96,948.0	647,000.0	35	33	6.0	1
Grey Belgium	Brussels	1,943.7	1,732.6	12.0	12,965.0	11,557.5	96,700.0	645,000.0	44	42	5.0	1
LVH & Partners	Brussels	1,325.2	1,029.7	29.0	9,008.0	7,644.5	65,928.5	448,161.5	31	26	19.0	1
Partner S.A.	Brussels	1,295.8	824.1	57.0	8,643.0	5,497.4	64,468.0	430,000.0	45	35	29.0	1
NCK/Belgium	Brussels	900.0	1,506.8	– 40.0	6,000.0	10,045.5	44,775.0	298,500.0	N/A	N/A	N/A	N/A
Leo Burnett S.A.	Brussels	678.0	650.0	4.0	4,525.0	4,338.0	33,750.0	225,113.0	15	15	0.0	1
MarkCom S.A.	Brussels	672.4	606.3	11.0	4,484.7	3,372.8	33,451.0	223,117.0	17	17	0.0	1
TBWA Belgium	Brussels	663.3	657.0	1.0	4,362.0	4,380.0	33,000.0	217,000.0	15	16	– 6.0	1
Trema & Partners	Brussels	512.1	524.6	– 2.0	3,417.0	3,497.4	25,480.0	170,000.0	14	16	– 13.0	1
Moussault Ayer	Antwerp	503.6	581.5	– 13.0	3,358.8	3,878.7	25,052.8	167,102.3	14	13	8.0	1
BERMUDA											**Exchange rate: 1.00 B dollars**	
Advertising Associates-Compton	Hamilton	1,365.2	1,085.9	26.0	2,644.3	5,272.1	1,365.2	2,644.3	19	22	– 14.0	1
BOLIVIA											**Exchange rate: 0.00954 peso**	
J. Walter Thompson & Asociados	La Paz	76.3	40.9	87.0	448.4	232.6	Ps8,001.3	Ps47,022.7	10	8	25.0	1
BRAZIL											**Exchange rate: 0.002576 cruzeiro**	
MPM Propaganda	Sao Paulo	37,609.6	36,801.1	N/A	150,438.4	147,204.4	Cr14.60 bill.	Cr58.40 bill.	904	920	– 1.7	14
Alcantara Machado, Periscinoto Comunicacoes	Sao Paulo/Rio	36,396.3	35,167.0	N/A	145,585.2	152,727.8	14.10 bill.	56.50 bill.	467	453	3.0	3
Salles/Inter-Americana de Publicidade	Sao Paulo	25,249.0	26,536.0	N/A	100,996.0	106,143.0	9.80 bill.	39.20 bill.	487	504	– 3.0	3
J. Walter Thompson Publicidade	Sao Paulo	21,818.7	17,209.6	N/A	145,530.9	114,788.2	8.50 bill.	56.50 bill.	371	369	0.5	2
Duailibi, Petit, Zaragoza	Sao Paulo	20,608.0	21,285.9	N/A	82,432.0	85,143.6	8.00 bill.	32.00 bill.	351	349	0.6	4
Norton Publicidade	Sao Paulo	19,320.0	20,502.0	N/A	77,280.0	82,008.0	7.50 bill.	30.00 bill.	354	420	– 16.0	8
McCann-Erickson Publicidade	Sao Paulo	19,224.0	17,091.0	N/A	128,124.0	113,997.0	7.50 bill.	49.80 bill.	336	303	11.0	N/A
Denison Propaganda	Sao Paulo	15,456.0	16,090.0	N/A	61,824.0	72,360.0	6.00 bill.	24.00 bill.	317	320	– 0.9	3
Standard Ogilvy & Mather	Sao Paulo/Rio	10,828.0	10,655.8	N/A	40,951.0	39,986.0	4.20 bill.	15.90 bill.	321	306	5.0	4
CBBA-Castelo Branco e Associados	Sao Paulo/Rio	7,213.0	7,537.0	N/A	32,200.0	34,974.0	2.80 bill.	12.50 bill.	202	236	– 14.0	3
SSC&B:Lintas Brasil	Sao Paulo/Rio	6,877.0	6,596.0	N/A	28,140.0	36,206.0	2.70 bill.	10.90 bill.	185	191	– 3.0	2
Young & Rubicam do Brasil	Sao Paulo	6,261.0	4,498.4	N/A	41,761.0	27,725.0	2.40 bill.	16.20 bill.	129	104	24.0	2
Lage Stabel/BBDO	Sao Paulo	6,020.1	5,845.5	N/A	21,380.8	21,744.1	2.30 bill.	8.30 bill.	85	87	– 2.0	2

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983	Billings 1983	Employes 1983	1982	Per cent change	offices
							FOREIGN CURRENCY					
SGB Publicidade e Promocoes	Rio de Janeiro	5,090.2	5,306.0	N/A	19,577.6	21,225.0	2.00 bill.	7.60 bill.	162	153	6.0	5
Gang S/A	Sao Paulo	4,959.0	6,633.0	N/A	12,364.8	18,693.0	1.90 bill.	4.80 bill.	155	185	– 16.0	2
Proeme Campbell-Ewald	Sao Paulo	4,514.0	4,524.0	N/A	30,108.0	30,175.0	1.80 bill.	11.70 bill.	130	132	– 1.5	N/A
Unidade Inter-Americana	Sao Paulo	3,980.7	3,862.0	N/A	15,922.9	11,653.0	1.60 bill.	6.20 bill.	N/A	N/A	N/A	N/A
JMM Publicidade	Rio de Janeiro	3,499.3	3,593.9	N/A	17,496.2	17,969.4	1.40 bill.	6.80 bill.	115	101	14.0	3
Publicidade Siboney	Sao Paulo	3,174.1	1,025.3	N/A	21,160.7	16,000.0	1.20 bill.	8.20 bill.	N/A	N/A	N/A	1
Leo Burnett Co.	Sao Paulo	2,491.0	2,491.0	N/A	16,616.0	16,612.0	967,074.0	6.50 bill.	70	59	19.0	1
Esquire	Rio/Sao Paulo	1,782.5	1,421.0	N/A	7,058.2	7,477.0	692,000.0	2.70 bill.	56	48	17.0	2
Caio Domingues e Associados Publicidade	Rio de Janeiro	1,763.0	3,015.0	N/A	9,559.0	14,273.0	684,267.0	3.70 bill.	61	91	– 33.0	2
Oliveira, Murgel Comunicacao	Rio de Janeiro	1,579.0	2,110.5	N/A	5,409.6	7,236.0	613,000.0	2.10 bill.	25	23	9.0	1
GTM&C	Sao Paulo	1,517.4	1,421.5	N/A	8,891.1	8,263.6	589,045.0	3.50 bill.	48	38	26.0	1
GGK	Sao Paulo	1,404.0	1,046.0	N/A	9,364.0	6,978.2	545,000.0	3.60 bill.	30	30	0.0	1
Novagencia de Propaganda	Sao Paulo	1,138.6	5,748.7	N/A	3,946.4	22,890.0	442,000.0	1.50 bill.	74	90	– 18.0	1
Universal & Grey Publicidade	Rio de Janeiro	626.0	663.3	N/A	4,175.2	4,665.4	243,000.0	1.60 bill.	39	31	26.0	2

* With Brazilian agencies, AA altered its procedure of determining an agency's "real growth" (applying 1983 exchange rate to 1982 returns) because it primarily shows the impact of inflation in that economy. Dollar figures for 1982 are based on the average annual exchange rate for that year.

BRITAIN

Exchange rate: 1.5421 pounds

Saatchi & Saatchi Group U.K.	London	73,904.0	54,781.6	87.0	492,693.3	364,958.0	£47,924.3	£319,495.1	1096	1123	– 2.0	11
J. Walter Thompson Group	London	34,206.9	29,680.8	15.0	237,175.0	204,945.1	22,182.0	153,800.0	663	648	2.0	2
D'Arcy MacManus Masius	London	28,177.3	25,620.5	10.0	238,384.0	188,593.0	18,272.0	154,584.0	540	619	– 13.0	2
Young & Rubicam Holdings	London	23,151.5	17,371.8	33.0	154,210.0	115,711.0	15,013.0	100,000.0	469	457	3.0	3
Charles Barker Group	London	23,100.0	19,600.0	18.0	151,100.0	130,500.0	15,000.0	98,000.0	600	605	– 1.0	10
McCann Group	London	21,947.2	19,836.0	11.0	146,386.0	132,306.0	14,232.0	94,927.0	414	430	– 4.0	N/A
Ted Bates Holdings	London	20,356.0	19,241.0	6.0	124,021.0	122,945.0	13,200.0	80,423.0	329	362	– 9.0	4
Ogilvy & Mather	London	20,254.4	17,197.3	18.0	131,029.6	112,317.6	13,134.3	84,968.3	324	298	9.0	N/A
Foote, Cone & Belding	London	17,828.0	14,892.0	20.0	118,914.0	99,330.0	11,561.0	77,112.0	448	327	37.0	4
Allen, Brady & Marsh	London	17,755.7	15,061.5	18.0	118,371.6	100,410.0	11,514.6	76,760.0	349	347	0.5	1
Royds Advertising Group	London	17,734.4	16,504.7	7.0	118,288.3	110,086.4	11,500.2	76,706.0	520	515	1.0	12
IMAA/Rex Stewart & Associates	London	14,300.0	10,720.0	33.0	74,020.0	64,770.0	9,270.0	48,000.0	589	550	7.0	19
Boase Massimi Pollitt	London	14,226.0	11,126.0	27.0	94,839.0	74,175.0	9,225.0	61,500.0	189	175	8.0	1
Collett Dickenson Pearce	London	13,983.2	12,174.9	15.0	97,312.4	85,341.5	9,067.6	63,103.8	220	225	– 2.0	N/A
Geers Gross Advertising	London	13,900.0	10,973.3	27.0	85,000.0	72,483.2	9,014.2	55,122.5	335	290	16.0	3
Leo Burnett Co.	London	12,374.0	12,203.0	1.0	82,533.0	81,392.0	8,024.0	53,520.0	245	235	4.0	1
Dorland Advertising	London	12,038.7	11,157.1	8.0	93,142.8	83,273.4	7,806.7	60,400.0	275	265	4.0	1
Davidson Pearce	London	11,874.0	8,080.0	47.0	84,815.0	60,342.0	7,700.0	55,000.0	199	168	18.0	1
Lowe Howard-Spink Campbell-Ewald	London	11,596.6	12,953.6	– 10.0	81,765.2	N/A	7,520.0	53,022.0	148	149	– 0.6	1
Doyle Dane Bernbach	London	11,575.0	7,865.0	47.0	68,039.0	52,431.0	7,506.0	44,121.0	231	174	33.0	3
Benton & Bowles Holdings	London	10,380.0	10,250.0	1.0	88,820.0	79,740.0	6,730.0	57,600.0	260	258	1.0	1
Grey Advertising	London	10,300.0	8,200.0	26.0	71,900.0	57,400.0	6,700.0	46,600.0	147	138	7.0	2
Grandfield Rork Collins	London	9,670.0	5,740.0	68.0	64,520.0	38,260.0	6,270.0	41,830.0	250	143	75.0	7
SSC&B:Lintas	London	7,965.0	8,031.0	– 1.0	57,327.0	55,920.0	5,165.0	37,175.0	164	166	– 1.0	4
McCormick Intermarco-Farner U.K.	London	7,556.0	6,477.0	17.0	50,890.0	43,333.0	4,900.0	33,000.0	158	155	2.0	4
Wight Collins Rutherford Scott	London	6,816.1	4,906.9	39.0	50,118.3	36,085.1	4,420.0	32,500.0	100	65	54.0	1
Sharps Advertising	London	6,320.0	6,170.0	2.0	39,920.0	36,360.0	4,100.0	25,890.0	120	120	0.0	1
KMP Partnership	London	6,192.3	4,934.7	25.0	42,099.3	36,085.2	4,015.9	27,300.0	92	87	N/A	1
The Leagas Delaney Partnership	London	5,860.0	4,163.7	41.0	43,950.0	30,687.8	3,800.0	28,500.0	70	50	40.0	2
Marsteller Ltd.	London	5,670.0	5,233.0	8.0	37,819.0	34,904.0	3,677.0	24,524.0	123	115	7.0	N/A
TBWA Great Britain	London	5,413.0	5,414.0	N/A	36,100.0	36,114.0	3,510.0	23,410.0	70	78	– 10.0	1
Butler Dennis Garland & Partners	London	4,695.7	4,618.6	2.0	32,229.9	30,379.4	3,045.0	20,900.0	76	76	0.0	1
Colman RSCG & Partners	London	4,680.0	3,680.0	28.0	31,000.0	24,700.0	3,030.0	20,100.0	65	64	2.0	1
Abbott Mead Vickers/SMS	London	4,629.5	4,110.5	13.0	24,263.0	19,110.9	3,002.1	17,791.2	86	85	1.0	1
Reeves Robertshaw Needham	London	4,626.0	3,855.0	20.0	26,216.0	21,281.0	3,000.0	17,000.0	60	55	9.0	1
Michael Bungey & Partners/DFS Holdings	London	4,317.9	5,474.5	– 21.0	34,547.8	36,697.3	2,800.0	22,500.0	100	80	25.0	1
LansdownEuro Ltd.	London	3,892.0	2,918.0	33.0	25,960.0	19,463.0	2,524.0	16,835.0	65	95	– 32.0	1
David Williams & Ketchum	London	3,855.5	4,573.1	– 16.0	25,703.8	30,487.6	2,500.2	16,668.0	69	86	– 25.0	1
Kirkwood & Partners	London	3,762.7	4,578.5	– 18.0	22,621.1	29,508.1	2,440.0	14,669.0	46	84	– 45.0	1
Harrison Advertising (International)	London	3,298.8	2,429.9	36.0	21,284.1	15,401.1	2,139.1	13,802.0	70	42	67.0	1
Chetwynd Haddons	London	3,221.4	2,954.7	9.0	22,600.0	21,000.0	2,089.0	14,650.0	82	75	9.0	1
Hedger Mitchell Stark/GGK	London	3,007.1	N/A	N/A	20,001.0	N/A	1,950.0	12,970.0	30	N/A	N/A	1
Moxon Dolphin & Kerby	London	2,606.0	2,462.7	6.0	8,077.0	6,183.8	1,690.0	5,237.9	N/A	55	N/A	1
NCK/London	London	2,400.0	4,977.7	– 52.0	16,000.0	33,185.1	1,556.4	10,376.0	N/A	N/A	N/A	N/A
Nicklin Advertising	London	2,347.5	2,012.4	17.0	15,650.0	13,416.0	1,522.5	10,150.0	41	42	– 2.0	2
Fletcher Shelton Delaney	London	2,293.0	2,168.2	1.0	16,178.0	15,277.6	1,487.0	10,491.4	N/A	N/A	N/A	N/A
Bastable Dailey	London	1,700.0	1,851.0	– 9.0	11,257.0	12,[illegible]7.0	1,102.4	7,300.0	52	47	11.0	N/A
Ogilvy & Mather (Scotland)	London	1,501.7	1,337.8	12.0	7,695.6	6,526.4	974.4	4,990.4	40	39	3.0	1
Ogilvy & Mather Direct Response	London	1,490.7	1,242.8	20.0	9,942.6	8,223.6	966.6	6,447.5	37	35	6.0	N/A
SSC&B:Lintas Overseas	London	1,155.0	1,125.7	3.0	9,840.1	9,505.5	749.0	6,381.0	27	26	4.0	1

CANADA

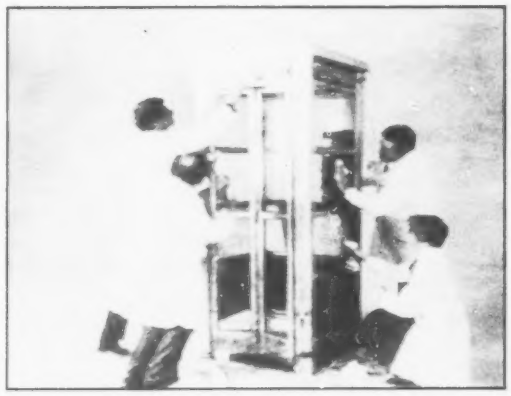
Exchange rate: 0.8133 C dollar

J. Walter Thompson	Toronto	18,242.0	16,272.0	12.0	121,617.0	108,532.0	C$22,430.0	C$149,535.0	377	376	0.3	4
Foster Advertising	Toronto	16,326.0	15,867.0	3.0	108,893.0	105,834.0	20,073.6	133,890.6	N/A	N/A	N/A	6
McKim Advertising	Toronto	15,940.0	14,644.0	9.0	142,327.5	122,727.0	19,600.0	175,000.0	376	349	8.0	6
Ogilvy & Mather (Canada)	Toronto	12,539.0	11,507.0	9.0	83,640.0	76,582.0	15,418.0	102,840.0	230	227	1.0	3
Young & Rubicam Ltd.	Toronto	9,990.0	8,097.0	23.0	66,360.0	53,800.0	12,283.0	81,600.0	211	188	12.0	3
Hayhurst Advertising	Toronto	9,100.0	9,100.0	N/A	73,197.0	68,317.0	11,200.0	90,000.0	192	205	– 6.0	3
Ronalds-Reynolds & Co.	Toronto	8,783.6	8,011.0	10.0	58,557.6	55,341.0	10,800.0	72,000.0	N/A	209	N/A	3
McCann-Erickson	Toronto	8,491.0	7,159.0	19.0	56,635.0	47,751.0	10,440.0	69,635.0	181	169	7.0	N/A
Cossette Communication-Marketing	Montreal	7,500.9	6,140.0	22.0	50,005.8	40,933.0	9,222.8	61,485.0	170	140	21.0	3

1984 EDITION **FOREIGN AGENCY INCOME** CANADA-DENMARK

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983 FOREIGN CURRENCY	Billings 1983	Employes 1983	1982	Per cent change	offices
Leo Burnett Co.	Toronto	7,443.0	6,407.0	16.0	49,647.0	42,736.0	9,152.0	61,044.0	141	138	2.0	2
Grey Advertising	Montreal	5,007.0	4,388.6	14.0	33,399.0	29,271.5	6,156.8	41,066.0	100	111	– 10.0	2
Ted Bates	Toronto	4,973.0	4,096.0	21.0	31,268.0	28,686.0	6,115.0	38,446.0	122	118	3.0	2
Foote, Cone & Belding	Toronto	3,748.2	3,387.9	11.0	25,000.6	22,597.6	4,608.7	30,739.7	86	83	4.0	2
Goodis-Wolf	Toronto	3,420.0	N/A	N/A	22,900.0	N/A	4,200.0	28,100.0	43	N/A	N/A	2
Carder Gray Advertising	Toronto	3,375.2	N/A	N/A	22,613.8	N/A	4,150.0	27,805.0	47	N/A	N/A	1
NCK/Canada	Toronto	3,000.0	3,607.1	– 17.0	22,000.0	24,047.7	3,688.8	27,051.2	N/A	N/A	N/A	N/A
Scali, McCabe, Sloves Canada	Toronto	2,759.0	2,894.0	– 5.0	20,457.0	20,083.0	3,392.9	25,152.4	50	54	– 7.0	2
Needham, Harper & Steers of Canada	Toronto	2,720.0	2,286.0	19.0	20,089.0	16,616.0	3,344.0	24,701.0	54	44	23.0	2
Doyle Dane Bernbach	Toronto	2,280.0	1,930.0	18.0	15,204.0	12,835.0	2,804.0	18,693.0	43	38	13.0	1
Kert Advertising Ltd.	Toronto	2,236.6	2,114.6	6.0	18,299.3	16,428.7	2,750.0	22,500.0	46	46	0.0	4
Ambrose, Carr, DeForest & Linton	Toronto	2,223.6	1,813.0	23.0	14,826.5	12,091.0	2,734.0	18,230.0	40	38	5.0	1
Enterprise Advertising Associates	Toronto	2,198.0	2,176.0	1.0	14,656.0	14,511.0	2,703.0	18,020.0	27	33	– 18.0	1
Benton & Bowles Canada	Toronto	2,110.5	1,728.3	22.0	19,888.2	16,452.8	2,595.0	24,453.8	46	39	18.0	1
D'Arcy MacManus Masius	Toronto	1,553.0	1,553.0	N/A	10,353.0	10,358.0	1,910.0	12,730.0	40	33	21.0	1
Leveille, Benton & Bowles	Montreal	1,375.3	1,204.0	14.0	9,014.3	7,798.4	1,691.0	11,083.6	32	31	3.0	1
SSC&B:Lintas	Toronto	1,339.0	1,163.5	15.0	8,931.0	7,760.3	1,646.4	10,981.2	30	32	– 6.0	1
Base Brown & Partners	Toronto	976.0	1,049.2	– 7.0	6,506.4	6,994.4	1,200.0	8,000.0	20	22	– 9.0	1
Campbell-Ewald (Canada)	Toronto	849.0	424.0	100.0	5,663.0	2,828.0	1,044.0	6,963.0	11	10	10.0	N/A
Publim Inc.	Quebec City	793.0	618.4	28.0	6,099.8	4,850.0	975.0	7,500.0	26	16	63.0	1
Grey Ronalds Smith	Toronto	719.0	N/A	N/A	4,795.7	N/A	884.0	5,896.6	30	N/A	N/A	2
Bleau, DuPerrey, Giguere & Associes	Quebec City	153.1	167.9	– 9.0	734.8	815.4	188.3	914.5	5	5	0.0	1
CHILE								**Exchange rate: 0.0219 peso**				
J. Walter Thompson Chilena	Santiago	4,066.4	3,911.0	4.0	27,110.5	26,074.5	Ps185,679.0	Ps1.24 bill.	90	90	0.0	1
SSC&B:Lintas (Chile)	Santiago	2,590.0	2,210.0	17.0	17,269.0	14,735.0	118,276.0	788,507.0	65	70	– 7.0	1
Publiart/BBDO	Santiago	1,748.1	1,820.0	– 4.0	11,660.1	11,319.9	79,824.0	532,426.0	39	38	3.0	1
McCann-Erickson SA de Publicidad	Santiago	1,693.0	1,499.0	13.0	11,292.0	9,998.0	77,304.0	515,618.0	51	55	– 7.0	N/A
Promoplan	Santiago	1,645.5	2,198.7	– 25.0	10,975.5	14,658.2	75,137.0	501,163.6	34	35	– 3.0	1
Azocar, Morrison, Walker	Santiago	1,604.7	1,371.1	17.0	10,636.9	8,786.7	73,275.9	485,702.8	28	26	8.0	1
Grey Chile	Santiago	1,245.9	1,297.8	– 4.0	8,310.4	8,656.1	56,892.2	379,471.0	47	45	4.0	1
Unitros Chile	Santiago	1,226.4	1,129.0	9.0	8,180.1	7,774.5	56,000.0	373,520.0	46	38	21.0	1
Publicitaria Epoca/Ted Bates	Santiago	811.5	865.3	– [illegible]	5,412.8	5,771.4	37,055.1	247,157.7	22	23	– 4.0	1
Sertec Inter-Americana	Santiago	790.6	691.6	14.0	5,273.2	4,612.9	36,100.0	240,787.0	21	20	5.0	1
Israel & de Bianchi	Santiago	761.9	679.4	12.0	5,073.9	4,533.3	34,790.0	231,675.0	27	26	4.0	1
Young & Rubicam de Chile	Santiago	743.0	632.0	18.0	4,956.0	4,215.0	33,925.0	226,300.9	24	21	14.0	1
Matte & Mendez/Compton Chile	Santiago	626.3	691.6	– 9.0	4,177.4	4,613.0	28,597.9	190,747.8	28	22	27.0	1
Hermosilla, Zegers y Cia.	Santiago	558.5	323.0	73.0	3,725.0	2,155.0	25,500.0	170,085.0	18	18	0.0	1
Leo Burnett Co.	Santiago	542.0	455.0	19.0	3,615.0	3,032.0	24,750.0	165,083.0	26	18	44.0	1
Baumlis Publicidad	Santiago	164.0	147.8	11.0	1,093.7	985.7	7,487.6	49,942.2	10	12	– 20.0	1
CHINA								**Exchange rate: 0.1429 HK**				
McCann-Erickson Jardine	Beijing	216.8	138.5	57.0	1,441.0	920.0	HK$1,517.0	HK$10,118.0	4	4	0.0	N/A
COLOMBIA								**Exchange rate: 0.0134 peso**				
Leo Burnett Colombiana	Bogota	3,894.0	2,768.0	41.0	25,969.5	18,460.0	Ps290,558.0	Ps1.94 bill.	129	129	0.0	1
McCann-Erickson Group	Bogota	2,634.0	2,163.0	22.0	17,569.0	14,427.0	196,320.0	1.31 bill.	113	108	5.0	N/A
Atenas/BBDO	Bogota	2,173.7	1,770.8	23.0	12,076.1	8,432.6	162,216.0	901,200.0	93	81	15.0	N/A
Puma Compton	Bogota	2,103.0	1,621.7	30.0	9,559.2	6,774.2	156,943.0	713,376.0	65	61	7.0	2
Centrum Publicitario	Cali	1,742.0	1,206.0	44.0	8,710.0	6,030.0	130,000.0	650,000.0	85	83	2.0	2
Contacto Publicidad	Cali	1,319.0	1,025.0	29.0	8,777.0	6,833.9	98,500.0	655,000.0	69	67	3.0	2
Jaime Uribe	Medellin	1,097.5	844.2	30.0	7,316.4	5,628.0	81,903.1	546,000.0	43	40	8.0	1
P.P.& A.	Bogota	294.5	233.1	26.0	1,416.0	1,108.9	21,979.4	105,670.0	42	39	8.0	1
COSTA RICA								**Exchange rate: 0.0250 colon**				
McCann-Erickson Centroamericana	San Jose	511.0	287.0	78.0	3,408.0	1,914.0	C20,440.0	C136,335.0	35	42	– 17.0	N/A
Publicidad Siboney	San Jose	229.4	156.3	47.0	1,529.4	1,041.7	9,176.0	61,176.0	N/A	N/A	N/A	1
APCU de Costa Rica	San Jose	94.0	52.5	79.0	625.0	350.0	3,760.0	25,000.0	14	13	8.0	1
CURACAO								**Exchange rate: 0.5560 florin**				
R.J. Dovale Advertising	Willemstad	282.0	246.3	14.0	1,840.8	1,660.1	FL507.1	FL3,310.9	15	12	25.0	1
CYPRUS								**Exchange rate: 1.95 C pound**				
Impact/BBDO	Nicosia	3,200.0	3,000.0	7.0	25,000.0	20,000.0	C£17,1,641.0	C£10,922.6	110	104	6.0	5
DENMARK								**Exchange rate: 0.1119 kroner**				
Ted Bates A/S	Copenhagen	4,275.0	3,885.2	10.0	27,141.0	26,455.0	DKr38,201.0	DKr242,544.0	91	87	5.0	1
scan-ad reklamebureau a/s	Aarhus	2,232.4	1,996.3	12.0	9,323.5	8,577.1	19,950.0	83,320.0	88	74	19.0	5
Thomas Bergsoe AS	Copenhagen	2,193.0	1,589.0	38.0	29,051.0	21,604.0	19,600.0	259,612.0	50	45	11.0	1
Ogilvy & Mather Gruppen	Copenhagen	2,065.3	1,851.3	12.0	15,279.6	13,934.9	18,457.0	136,547.0	56	53	6.0	2
Henriksen & Sieling/BBDO	Copenhagen	1,993.4	1,586.5	26.0	14,186.0	10,783.4	17,814.0	126,772.0	43	35	23.0	2
Gutenberghus Reklamebureau	Copenhagen	1,967.0	1,796.7	9.0	13,572.4	11,374.1	17,578.0	121,290.0	53	51	4.0	1
Young & Rubicam	Copenhagen	1,916.0	1,402.0	37.0	12,780.0	9,351.0	17,129.0	114,209.7	46	38	21.0	1
Lintas Reklamebureau	Copenhagen	1,778.0	1,629.0	9.0	12,533.0	10,950.0	15,891.0	111,989.0	41	47	– 13.0	2
Lyre & Valbo Reklamebureau	Copenhagen	1,265.0	870.7	45.0	8,229.0	5,565.0	11,307.0	73,534.0	32	31	3.0	1
D'Arcy MacManus Masius	Copenhagen	1,213.0	1,070.0	13.0	8,951.0	7,945.0	10,837.0	79,988.0	34	35	– 3.0	1
Intermarco-Farner ProMedia	Copenhagen	1,181.0	1,049.1	13.0	7,870.0	6,994.0	10,550.0	70,331.0	24	23	4.0	1
Leo Burnett Co.	Copenhagen	1,091.0	1,000.0	9.0	7,277.0	6,669.0	9,750.0	65,033.0	24	25	– 4.0	1

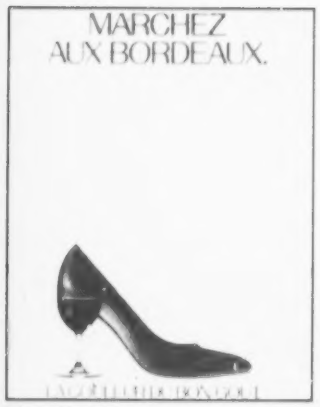
J. Walter Thompson Chilena
Santiago, Chile



Carder Gray Advertising
Toronto, Canada

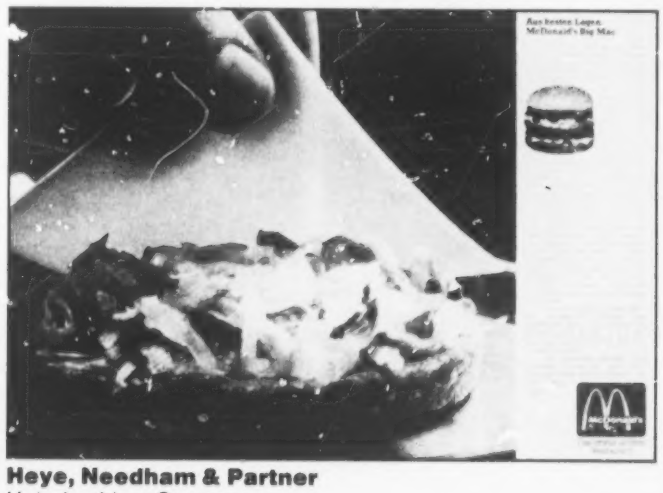
Weber & Sorensen
Aarhus, Denmark

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983	Billings 1983	Employes 1983	1982	Per cent change	offices
							FOREIGN CURRENCY					
Lockey/NCK Denmark	Copenhagen	1,050.0	978.3	7.0	7,000.0	6,521.8	9,383.4	62,556.2	N/A	N/A	N/A	N/A
J. Walter Thompson Co.	Copenhagen	1,027.3	877.9	17.0	7,373.6	6,678.0	9,180.6	65,894.7	22	19	16.0	1
DEA/Grey Reklamebureau	Copenhagen	981.1	730.5	34.0	6,544.1	4,902.2	8,768.0	58,482.0	17	16	6.0	N/A
Bergenholz & Arnesen	Copenhagen	939.2	858.9	9.0	9,285.2	6,586.3	8,393.0	82,978.0	26	23	13.0	1
NP/Grey	Egaa-Aarhus	923.0	N/A	N/A	6,156.0	N/A	8,248.0	55,014.0	16	N/A	N/A	1
Egeberg & Vinding Advertising	Copenhagen	857.0	724.2	18.0	4,827.0	4,159.3	7,658.7	43,137.0	21	22	– 4.0	1
McCann-Erickson	Copenhagen	772.0	676.0	14.0	5,149.0	4,509.0	6,895.0	45,990.0	23	23	0.0	N/A
Innovation Compton	Copenhagen	717.3	296.1	142.0	6,449.5	4,043.2	6,410.0	57,636.0	21	15	40.0	1
Gorm Larsen Benton & Bowles	Copenhagen	690.9	660.8	5.0	5,341.8	4,656.6	6,174.0	47,737.2	18	17	6.0	N/A
Weber & Sorensen	Aarhus	644.7	671.3	– 4.0	4,121.8	4,220.9	5,761.0	36,835.0	23	24	– 4.0	1
Ipsen & Parmo	Copenhagen	637.0	609.2	5.0	N/A	2,181.2	5,692.0	N/A	11	10	10.0	1
Inter-Media Denmark	Copenhagen	617.0	N/A	N/A	16,188.0	N/A	5,514.1	144,672.2	N/A	N/A	N/A	1
Foote, Cone & Belding	Copenhagen	452.8	381.6	19.0	3,020.1	2,545.5	4,046.3	26,989.1	13	13	0.0	1
a-reklame a/s	Silkeborg	401.7	330.8	21.0	2,678.1	2,205.3	4,017.9	2,956.2	21	21	0.0	1
Ervaco Kobenhavn A/S	Copenhagen	319.0	231.6	38.0	2,128.0	1,544.2	2,850.8	19,017.1	7	7	0.0	1
DOMINICAN REPUBLIC								**Exchange rate: 1.00 dollar**				
Young & Rubicam Damaris	Santo Domingo	2,224.0	1,464.0	52.0	14,834.0	9,765.0	2,224.0	14,834.0	96	71	35.0	1
McCann-Erickson	Santo Domingo	585.0	224.0	161.0	3,902.0	1,494.0	585.0	3,902.0	16	9	78.0	N/A
Publicidad Siboney	Santo Domingo	377.2	225.0	68.0	2,514.4	1,500.0	377.2	2,514.4	N/A	N/A	N/A	1
Leo Burnett Co.	Santo Domingo	252.0	N/A	N/A	1,681.0	N/A	252.0	1,681.0	12	N/A	N/A	1
DUBAI								**Exchange rate: 0.2730 dirham**				
Madco Dubai	Dubai	960.0	890.0	8.0	4,200.0	3,700.0	3,516.5	15,384.6	N/A	N/A	N/A	1
Lintas:Middle East	Dubai	890.0	736.0	21.0	4,365.0	3,903.0	Dir3,260.0	Dir15,988.0	17	18	– 6.0	1
ECUADOR								**Exchange rate: 0.0247 sucre**				
Organizaciones Norlop	Guayaquil	1,815.5	1,405.4	29.0	9,820.7	7,376.2	S73,500.0	S397,600.0	90	84	7.0	2
McCann-Erickson (Ecuador)	Guayaquil	1,031.1	874.0	18.0	6,877.0	5,830.0	41,745.0	278,439.0	43	54	– 20.0	N/A
Publicidad Artefilme	Guayaquil	650.8	547.8	19.0	4,338.5	2,217.9	26,347.1	175,647.8	N/A	N/A	N/A	1
Veritas Publicitaria	Guayaquil	620.7	557.9	11.0	4,438.3	3,721.1	25,130.1	179,687.1	38	36	6.0	1
EGYPT								**Exchange rate: 1.4295 pound**				
Societe Egyptienne de Publicite	Cairo	9,154.9	6,634.0	38.0	19,682.9	14,263.0	E£6,404.2	E£13,769.1	276	270	2.0	4
Americana Advertising	Guiza	1,026.0	N/A	N/A	7,663.8	N/A	717.8	5,361.2	73	51	– 43	1
Advertising & Marketing Assn., Leo Burnett	Cairo	334.5	306.0	9.0	2,231.0	2,040.0	234.0	1,561.0	N/A	N/A	N/A	1
EL SALVADOR								**Exchange rate: 0.4000 colon**				
McCann-Erickson (El Salvador)	San Salvador	373.0	404.0	– 8.0	2,488.0	2,695.0	C934.0	C6,230.0	20	29	– 31.0	N/A
APCU de El Salvador	San Salvador	225.0	185.4	21.0	1,500.0	1,236.0	562.5	3,750.0	8	8	0.0	1



Ted Bates
Paris, France

Publicis Conseil
Paris, France



Heye, Needham & Partner
Unterhaching, Germany

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983 (FOREIGN CURRENCY)	Billings 1983 (FOREIGN CURRENCY)	Employes 1983	1982	Per cent change	offices
FINLAND												Exchange rate: 0.1822 markka
Oy Liikemainonta-McCann AB	Helsinki	5,157.0	3,873.0	33.0	34,397.0	25,833.0	Fmk28,302.0	Fmk188,774.0	104	97	7.0	N/A
Mainosyhtyma Oy	Helsinki	4,141.0	3,679.0	13.0	33,449 0	29,902.0	22,730.0	183,586.0	150	133	13.0	4
Turkama & Kumppanit Oy Mainostomisto	Helsinki	3,735.1	3,140.7	19.0	24,401.8	21,643.8	20,500.0	133,928.7	93	86	8.0	1
Oy Sek AB	Helsinki	3,701.9	3,320.4	12.0	32,754.5	31,187.5	20,318.0	179,772.4	103	101	2.0	1
Markkinointi Viherjuuri Oy	Helsinki	3,451.0	2,667.0	29.0	22,470.0	17,516.0	18,942.0	123,328.0	79	72	10.0	2
Oy Mainos Taucher Reklam	Helsinki	3,443.0	3,066.2	12.0	26,072.8	22,841.8	18,900.0	143,100.0	117	116	0.9	2
Finnad-Bates Advertising	Helsinki	2,951.6	2,475.4	19.0	19,687.4	16,510.6	16,200.0	108,054.0	78	69	13.0	5
Erva-Latvala Oy	Helsinki	2,751.2	2,369.0	16.0	21,355.7	19,423.6	15,100.0	117,210.0	90	87	4.0	2
Lintas Oy	Helsinki	2,513.0	2,379.0	6.0	17,766.0	16,726.0	13,795.0	97,511.0	64	61	5.0	1
Tehomainos Oy	Helsinki	2,438.0	2,214.0	10.0	12,190.0	11,072.0	13,379.7	66,899.0	69	66	5.0	1
MK-mainos oy	Helsinki	1,882.0	1,676.0	12.0	21,229.0	18,597.0	10,329.0	116,513.0	70	67	4.0	
Oy AC-Mainos AB	Helsinki	1,644.7	1,694.5	– 3.0	12,911.2	12,454.8	9,027.0	70,863.0	57	58	– 2.0	1
Creator Oy	Helsinki	1,603.4	925.2	73.0	13,938.2	6,574.3	8,800.0	76,499.5	20	20	0.0	N/A
Suomen Ilmotuskeskus Oy Ilmo	Helsinki	1,592.6	1,157.8	38.0	10,985.8	9,345.0	8,741.0	60,295.5	39	40	– 3.0	1
Ogilvy & Mather Oy	Helsinki	1,342.3	1,179.7	14.0	10,490.2	8,530.5	7,367.4	57,575.0	42	42	0.0	1
Oy Interplan AB	Helsinki	1,270.5	1,100.9	15.0	10,617.5	8,756.5	6,974.5	58,274.0	44	37	19.0	1
Oy Valotorni AB	Helsinki	1,217.0	1,049.7	16.0	10,085.2	9,015.9	6,679.6	55,352.6	36	34	6.0	N/A
Juniormainos Oy	Helsinki	1,200.0	1,000.0	20.0	8,750.0	8,020.0	6,500.0	48,000.0	43	38	13.0	1
Markkinointi Topitorma Oy	Helsinki	1,184.0	820.0	44.0	8,293.0	5,746.0	6,500.0	45,513.0	33	32	3.0	1
Oy Ervaco Ab	Helsinki	1,164.0	953.8	22.0	7,764.0	6,358.8	6,388.0	42,608.8	28	28	0.0	1
Kauppamainos Oy	Helsinki	1,111.4	911.0	22.0	9,709.0	7,306.2	6,100.0	53,300.0	24	21	14.0	1
Mainostoimisto LSM Oy	Turku	963.0	777.0	24.0	6,707.0	5,169.0	5,286.0	36,811.0	28	30	– 7.0	1
Lahti-Mainos Oy	Lahti	779.6	599.8	30.0	5,892.2	4,049.3	4,279.0	32,339.0	29	25	16.0	1
Reklamainos Oy	Helsinki	674.1	718.6	– 6.0	5,921.6	6,009.7	3,700.0	32,500.0	N/A	N/A	N/A	N/A
D'Arcy MacManus Masius	Helsinki	664.0	602.0	10.0	4,426.0	4,016.0	3,642.0	24,292.0	17	18	– 6.0	1
Oy Goodwill	Helsinki	386.0	278.9	38.0	2,866.0	1,985.8	2,118.0	15,731.0	9	8	13.0	1
FRANCE												Exchange rate: 0.1360 franc
Publicis Conseil	Paris	37,221.0	32,190.0	16.0	253,676.0	209,498.0	FF273,688.0	FF1.87 bill.	776	741	5.0	11
Havas Conseil Groupe	Paris	26,484.0	24,085.6	10.0	176,575.6	160,779.2	194,735.0	1.3 bill.	565	622	– 9.0	N/A
Roux Seguela Cayzac & Goudard	Paris	23,120.0	19,584.0	18.0	153,992.8	130 628.0	170,000.0	1.13 bill.	N/A	N/A	N/A	11
Young & Rubicam France	Paris	18,038.0	15,458.0	17.0	120,313.0	103,105.0	132,579.0	884,654.0	468	435	8.0	16
Lintas: Paris	Paris	14,162.8	11,693.8	21.0	96,528.9	80,736.9	104,138.0	709,771.0	198	189	5.0	4
Doyle Dane Bernbach & Peyrot Paternot Garnier	Paris	13,712.0	9,146.0	50.0	91,463.0	61,003.0	100,820.0	672,534.0	247	168	47.0	2
Belier Conseil	Paris	12,440.0	9,588.0	30.0	82,975.0	66,640.0	91,470.1	610,106.9	N/A	N/A	N/A	1
ECOM/Univas	Paris	11,429 4	8,921.6	28.0	76,234.0	59,507.0	84,040.0	560,500.0	193	168	15.0	1
Dupuy-Compton & Associes	Paris	8,891.7	6,868.0	30.0	61,322.0	48,010.0	65,380.0	450,900.0	150	142	6.0	4
McCann-Erickson Group	Paris	8,440.0	7,245.0	17.0	56,295.0	48,324.0	62,058.0	413,927.0	138	151	– 9.0	N/A
Futurs Groupe	Neuilly	8,160.0	5,916.0	38.0	54,400.0	39,440.0	60,000.0	400,000.0	170	123	38.0	N/A
Feldman Calleux Associes	Paris	7,402.0	6,079.0	22.0	49,368.0	40,549.0	54,423.0	363,001.0	106	105	1.0	5
Ogilvy & Mather	Paris	7,049.2	5,346.7	32.0	48,960.0	40,800.0	51,832.7	360,000.0	118	104	14.0	N/A
Homsy Delafosse & Associes	Paris	6,922.4	5,657.6	22.0	53,094.4	43,329.6	50,900.0	390,400.0	44	44	0.0	1
Ted Bates	Paris	6,816.3	6,179.0	10.0	N/A	N/A	50,120.0	N/A	149	149	0.0	4
Crehalet, Foliot, Recherches et Publicite	Paris	6,664.0	5,508.0	21.0	44,472.0	36,720.0	49,000.0	327,000.0	80	72	11.0	N/A
Intermarco-Conseil	Neuilly	6,270.0	6,155.0	2.0	41,820.0	41,056.0	46,100.0	307,490.0	144	147	– 2.0	1
J. Walter Thompson	Paris	6,256.0	5,304.0	18.0	45,154.0	39,440.0	46,000.0	332,000.0	100	92	9.0	1
TBWA France	Paris	6,242.0	5,874.0	6.0	40,936.0	39,182.0	45,900.0	301,000.0	99	88	13.0	1
Impact-FCB	Paris	5,914.0	6,269.0	– 6.0	39,444.0	41,813.0	43,483.0	290,032.0	119	139	– 15.0	1
Bazaine DFS	Paris	5,168.0	4,624.0	12.0	35,360.0	31,280.0	38,000.0	260,000.0	97	93	4.0	1

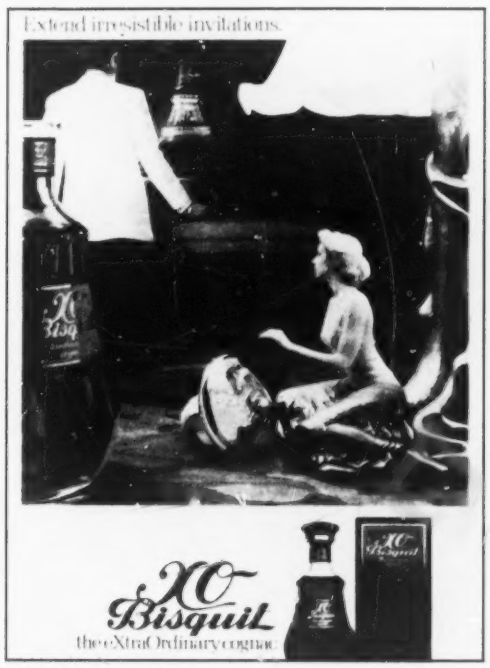
1984 EDITION **FOREIGN AGENCY INCOME** FRANCE-GHANA

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983	Billings 1983	Employes 1983	1982	Per cent change	offices
							FOREIGN CURRENCY					
Grey	Paris	5,120.3	5,158.8	– 0.7	34,152.3	34,409.1	37,649.1	251,119.7	90	90	0.0	1
Synergie K.E.	Paris	5,018.4	4,160.0	21.0	40,800.0	34,000.0	36,900.0	300,000.0	102	87	17.0	1
Createurs Conseil	Neuilly	4,300.0	4,000.0	8.0	41,000.0	38,000.0	32,000.0	300,000.0	60	65	– 8.0	1
Alice	Paris	4,117.0	3,293.2	25.0	27,460.0	21,717.3	30,271.9	201,910.6	N/A	N/A	N/A	1
D'Arcy MacManus Masius	Paris	3,651 0	2,938.0	24.0	24,341.0	19,584.0	26,846.0	178,988.0	68	50	36.0	1
CLM/BBDO	Paris	3,205.4	2,514.0	28.0	21,352.0	16,769.0	23,569.0	157,000.0	61	57	7.0	1
Euro Advertising Lyon	Lyon	3,101.0	2,719.0	11.0	20,684.0	18,136.0	22,800.0	152,076.0	56	75	– 25.0	1
Fusion	Paris	2,951.0	2,420.8	22.0	19,684.5	16,146.7	21,700.0	144,739.0	81	76	7.0	1
Maime Arnodin, Fayolle, International Associes	Paris	2,856.0	2,580.6	11.0	19,053.6	17,217.6	21,000.0	140,100.0	48	44	9.0	1
M.A.O.	Paris	2,652.0	2,230.4	19.0	20,332.0	17,108.8	19,500.0	149,500.0	37	34	9.0	1
GGK International	Paris	2,414.0	381.0	534.0	16,100.0	2,500.0	17,750.0	118,382.0	20	5	300.0	2
Taurus	Paris	2,386.0	2,136.1	12.0	15,915.0	14,952.9	17,544.0	117,021.4	N/A	N/A	N/A	1
Marsteller International	Paris	2,321.0	1,615.0	44.0	15,481.0	10,772.0	17,066.0	113,831.0	58	52	12.0	N/A
Leo Burnett Co.	Paris	2,246.0	2,478.0	– 9.0	14,982.0	16,530.0	16,516.0	110,162.0	57	51	12.0	1
Publi-Est	Metz	1,972.0	1,732.5	14.0	13,153.2	11,555.8	14,500.0	96,715.0	58	53	9.0	1
Unicom	Cesson Sevigne	1,972.0	1,564.0	26.0	13,153.2	10,431.9	14,500.0	96,715.0	60	44	36.0	3
Ogilvy, Defrenois Direct	Paris	1,812.0	1,037.0	75.0	12,089.0	6,919.0	13,327.0	88,891.0	27	16	69.0	1
Benton & Bowles Publicite	Paris	1,757.0	1,632.0	8.0	11,720.0	10,887.0	12,920.0	86,176.0	31	31	0.0	1
EDIP	Paris	1,715.1	1,557.9	10.0	11,433.4	10,386.2	12,611.0	84,069.0	27	29	– 7.0	1
Uniconseil	Lyon	1,700.0	1,550.4	10.0	11,339.0	10,341.2	12,500.0	83,375.0	43	42	2.0	1
CPV Paris	Paris	1,496.0	1,319.2	13.0	11,152.0	9,792.0	11,000.0	82,000.0	26	24	8.0	1
Eldorado	Paris	1,387.2	1,088.0	28.0	10,336.0	7,888.0	10,200.0	76,000.0	21	20	5.0	1
Dassas Jaglin Walhain Needham	Paris	1,325.0	1,020.0	30.0	8,840.0	6,800.0	9,750.0	65,000.0	18	14	29.0	1
D 10	Latresne	1,224.0	965.6	27.0	8,164 1	6,440.6	9,000.0	60,030.0	40	34	18.0	2
INF.14	Neuilly	1,190.0	1,068.1	11.0	7,937.0	7,476.4	8,750.0	58,360.0	N/A	N/A	N/A	1
GMC Ayer, Brains Ayer	Paris	1,128.8	805.8	40.0	7,529.4	5,372.0	8,300.0	55,361.0	N/A	18	N/A	1
Campbell-Ewald Group	Paris	1,061.0	1,346.0	– 21.0	7,077.0	8,978.0	7,803.0	52,046.0	27	31	– 13.0	N/A
OPF Univas	Paris	991.4	864.0	15.0	5,508.0	4,284.0	7,290.0	40,500.0	22	19	16.0	1
Novation	Marseille	843.2	897.6	– 6.0	5,624.1	5,987.0	6,200.0	41,354.0	24	23	4.0	N/A
Compar	Neuilly	843.0	519.2	62.0	5,657.0	3,549.6	6,198.4	41,600.0	13	11	18.0	1
Strategie	Lyon	802.0	809.9	– 1.0	5,349.0	5,429.3	5,897.0	39,330.7	N/A	N/A	N/A	1
Campagnes	Lyon	516.8	299.2	73.0	3,447.1	1,995.7	3,800.0	25,346.0	9	6	50.0	N/A
Optima	Marseille	442.0	427.9	3.0	2,948.1	2,853.8	3,250.0	21,677.5	10	N/A	N/A	N/A
Domino Ketchum	Paris	286.6	231.2	24.0	2,008.0	1,557.7	2,107.7	14,765.0	N/A	8	N/A	1
Agency A	Paris	142.8	61.2	133.0	952.0	408.0	1,050.0	7,000.0	23	9	156.0	1
GERMANY								**Exchange rate: 0.3998 mark**				
Lintas	Hamburg	25,900.0	27,100.0	– 4.4	172,700.0	180,400.0	DM64,800.0	DM431,800.0	445	472	– 6.0	4
Team/BBDO Group	Duesseldorf	24,458.0	22,562.0	8.0	163,134.0	150,485.0	61,175.0	408,038.0	385	369	4.0	6
J. Walter Thompson	Frankfurt	23,195.8	19,974.9	16.0	150,027.1	131,221.6	58,018.5	375,255.3	394	366	8.0	8
McCann-Erickson Group	Frankfurt	22,256.0	22,376.0	– 0.5	148,448.0	149,248.0	55,668.0	371,306.0	411	435	– 6.0	N/A
Young & Rubicam	Frankfurt	15,082.0	14,000.0	8.0	100,597.0	93,380.0	37,705.0	251,619.0	270	273	– 1.0	5
Grey Duesseldorf	Duesseldorf	13,901.0	13,895.0	0.1	92,673.0	92,634.0	34,770.0	231,800.0	220	230	– 4.0	3
Ogilvy & Mather Group	Frankfurt	13,800.0	12,200.0	13.0	92,200.0	81,400.0	34,600.0	230,600.0	249	238	5.0	5
D'Arcy MacManus Masius	Frkft/Hamburg	11,120.0	9,728	14.0	74,168.0	64,885.0	27,814.0	185,514.0	215	208	3.0	2
Doyle Dane Bernbach	Duesseldorf	11,104.0	10,688.0	4.0	74,064.0	71,290.0	27,774.0	185,253.0	223	199	12.0	2
William Wilkens Werbeagentur	Hamburg	10,415.0	9,929.0	5.0	69,470.0	66,225.0	26,051.0	173,762.0	161	172	– 6.0	3
RW Eggert Werbeagentur	Duesseldorf	9,794.7	9,075.5	8.0	65,330.5	60,409.8	24,499.0	163,408.0	175	161	9.0	1
GGK Duesseldorf Werbeagentur	Duesseldorf	9,515.0	9,235.0	3.0	63,368.0	61,609.0	23,800.0	158,500.0	149	147	1.0	2
Konsell Partners	Frankfurt	8,550.0	8,250.0	4.0	63,500.0	55,150.0	21,386.0	158,830.0	56	54	4.0	1
Compton Germany	Frankfurt	8,460.0	7,916.0	7.0	56,400.0	52,774.0	21,150.0	141,000.0	134	128	5.0	2
Troost Campbell-Ewald	Duesseldorf	8,432.0	8,955.0	– 6.0	56,241.0	59,730.0	21,091.0	140,677.0	177	174	2.0	N/A
Luerzer, Conrad & Leo Burnett	Frankfurt	8,251.0	7,479.0	10.0	55,034.0	49,888.0	20,638.0	137,655.0	134	132	2.0	1
Intermarco-Farner Werbeagenturen	Frankfurt	7,942.0	7,870.0	0.09	52,974.0	52,494.0	19,865.0	132,500.0	143	143	0.0	5
Heye, Needham & Partner	Unterhaching	6,660.0	6,060.0	10.0	44,418.0	40,420.0	16,660.0	111,100.0	110	110	0.0	3
Ted Bates Werbeagentur	Frankfurt	6,632.0	6,262.0	6.0	44,205.0	41,771.0	16,588.0	110,642.0	117	120	– 3.0	1
Foote, Cone & Belding Germany	Frankfurt	6,295.5	7,158.1	– 12.0	41,990.7	47,744.7	15,746.5	105,029.4	124	146	– 15.0	5
Benton & Bowles Werbeagentur	Frankfurt	6,011.0	7,401.0	– 19.0	40,093.0	49,375.0	15,036.0	100,290.0	125	161	– 22.0	1
Baums, Mang und Zimmermann	Duesseldorf	5,557.0	5,117.0	9.0	37,101.0	34,303.0	13,900.0	92,800.0	74	70	6.0	1
TBWA Germany	Frankfurt	5,417.0	4,755.0	14.0	36,622.0	31,715.0	13,549.0	91,600.0	79	79	– 1.0	N/A
Scholz & Friends	Hamburg	5,237.0	4,564.0	15.0	34,933.0	30,424.0	13,100.0	87,377.0	65	53	23.0	1
Von Mannstein Gruppe	Solingen	4,987.0	4,495.0	11.0	33,263.0	29,985.0	12,474.0	83,200.0	67	62	8.0	3
Spiess & Ermisch Werbeagentur	Duesseldorf	4,674.0	4,000.0	17.0	31,184.0	26,510.0	11,690.0	78,000.0	63	56	13.0	1
Copartner Ayer Werbeagentur	Hamburg	4,321.4	4,090.0	6.0	28,825.6	27,280.0	10,809.0	72,100.0	80	78	3.0	2
DFS&R Advertising	Dsldrf/Munich	4,080.0	3,748.1	9.0	27,199.9	24,987.5	10,200.5	68,034.0	78	82	– 5.0	2
Westag Werbeagentur	Cologne	3,982.0	3,902.0	2.0	26,559.0	26,546.7	9,960.0	66,430.0	79	76	4.0	1
M.P.W. Univas	Duesseldorf	3,800.0	3,200.0	19.0	41,600.0	33,200.0	9,500.0	104,000.0	80	70	14.0	1
Hildmann Simon Rempen & Schmitz	Duesseldorf	3,108.3	3,016.1	3.0	22,389.0	21,189.0	7,769.6	56,000.0	44	45	– 2.0	1
Marsteller International	Frankfurt	2,511.0	2,284.0	10.0	16,748.0	15,234.0	6,281.0	41,891.0	46	43	7.0	1
Durana Ketchum Werbeagentur	Frankfurt	2,123.0	2,243.0	– 5.0	14,153.0	14,951.3	5,310.0	35,400.0	26	34	– 24.0	1
E&P Erdmann & Partner	Duesseldorf	2,076.9	2,170.0	– 4.0	13,853.1	14,473.0	5,194.9	34,650.0	29	31	– 7.0	1
Die Werbe Euro Advertising	Duesseldorf	2,040.0	2,244.0	– 9.0	13,607.0	14,967.0	5,103.0	34,037.0	44	42	5.0	1
IMAA/Die Gilde Werbeagentur	Hamburg	1,991.0	1,974.2	0.9	13,280.0	13,168.0	4,980.0	33,217.0	24	29	– 17.0	1
Schoen Werbeagentur	Duesseldorf	1,079.5	999.5	8.0	7,196.4	6,676.7	2,700.0	18,000.0	11	10	10.0	1
Kastner & Partner	Frankfurt	607.0	50.0	1,114.0	4,048.0	331.0	1,518.0	10,125.0	12	5	140.0	1
Wirz & Hafner Werbeberatung	Frankfurt	500.0	250.0	100.0	3,490.0	2,280.0	1,250.0	8,750.0	9	5	80.0	4
Kenyon & Eckhardt	Duesseldorf	179.9	237.0	– 24.0	1,097.0	1,600.0	450.0	2,744.2	3	3	0.0	1
GHANA								**Exchange rate: 0.3640 cedi**				
Lintas Ghana Ltd.	Accra	568.0	343.0	66.0	3,581.0	2,174.0	1,562.0	9,841.0	29	20	45.0	1

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983 (FOREIGN CURRENCY)	Billings 1983 (FOREIGN CURRENCY)	Employes 1983	1982	Per cent change	offices
GREECE								**Exchange rate: 0.0120 drachma**				
Spot/Thompson Advertising	Athens	1,632.0	1,512.0	8.0	12,600.0	10,800.0	Dr136,000.0	Dr1.05 bill.	51	51	0.0	1
Ikon/DD/BBDO	Athens	1,218.5	585.6	108.0	8,351.8	3,906.3	101,540.1	688,965.1	60	35	71.0	1
Euro-Advertising	Athens	948.0	860.4	10.0	6,800.0	5,760.0	79,000.0	567,000.0	49	49	0.0	1
Ted Bates	Athens	883.8	507.6	74.0	5,592.0	3,049.2	73,650.0	466,000.0	50	26	92.0	1
Adel-Compton	Athens	876.0	687.6	27.0	5,976.0	4,563.6	73,000.0	498,000.0	36	35	3.0	1
Alector Advertising	Athens	864.0	819.0	5.0	6,480.0	5,976.0	72,000.0	540,000.0	42	42	0.0	1
Olympic Advertising	Athens	762.0	571.0	33.0	5,082.5	3,808.5	63,500.0	423,545.0	30	35	– 14.0	1
Gnomi/FCB	Athens	728.0	576.3	26.0	4,855.6	3,844.2	60,664.0	404,632.0	43	48	– 10.0	1
SSC&B:Lintas (Hellas)	Athens	679.7	627.0	8.0	4,240.3	3,666.0	56,644.7	353,335.3	25	30	– 17.0	1
J.N. Leoussis Advertising	Athens	624.0	N/A	N/A	4,200.0	N/A	52,000.0	350,000.0	28	24	17.0	1
Producta Univas	Athens	575.7	N/A	N/A	3,840.0	N/A	47,976.0	320,000.0	N/A	N/A	N/A	1
McCann-Erickson (Hellas)	Athens	563.0	428.0	32.0	3,755.0	2,855.0	46,872.0	312,636.0	31	29	7.0	N/A
Leo Burnett Advertising	Athens	532.4	563.0	– 5.0	3,551.0	3,755.0	44,370.0	295,948.0	34	44	– 23.0	N/A
Lamda Alpha Advertising	Athens	480.3	486.8	– 1.0	3,316.1	3,289.1	40,021.5	276,341.7	N/A	N/A	N/A	3
Echo Advertising	Athens	461.0	438.0	6.0	3,331.7	3,144.0	38,420.0	281,000.0	28	26	8.0	2
D'Arcy MacManus Masius Ergon	Athens	302.9	325.2	– 7.0	2,136.0	2,059.0	25,240.0	178,000.0	22	22	0.0	1
IN Ltd.	Athens	276.0	N/A	N/A	2,656.9	N/A	23,000.0	221,410.0	28	N/A	N/A	1
Victory Advertising	Athens	273.6	264.0	3.0	2,028.0	1,824.0	22,800.0	169,000.0	22	22	0.0	1
Epsilon Epsilon	Athens	196.9	172.6	14.0	1,530.8	1,578.0	16,412.0	127,563.0	15	14	7.0	1
Geo Advertising	Athens	188.7	122.5	54.0	1,765.1	884.3	15,725.0	147,094.0	15	11	36.0	1
Sigma	Athens	181.2	177.6	2.0	1,208.6	1,184.8	15,100.0	100,717.0	16	17	– 6.0	1
Giad Advertising	Athens	127.7	99.2	29.0	916.4	760.9	10,640.8	76,369.4	17	17	0.0	1
GUATEMALA								**Exchange rate: 1.00 dollar**				
APCU Thompson Asociados	Guatemala City	800.0	721.0	11.0	5,330.0	4,800.0	800.0	5,330.0	42	42	0.0	1
Publicidad McCann-Erickson	Guatemala City	741.0	986.0	– 25.0	4,942.0	6,577.0	741.0	4,942.0	29	41	– 29.0	N/A
Publicidad Siboney	Guatemala City	399.3	375.0	6.0	2,662.3	2,500.0	399.3	2,662.3	N/A	N/A	N/A	1
Publicmerca S.A.	Guatemala City	340.0	262.0	30.0	2,115.0	1,500.0	340.0	2,115.0	21	20	5.0	1
HONDURAS								**Exchange rate: 0.5000 lempira**				
McCann-Erickson Centroamericana (Honduras)	Tegucigalpa	270.0	275.0	– 2.0	1,801.0	1,834.0	L539.0	L549.0	17	14	21.0	N/A
APCU de Honduras	Tegucigalpa	225.0	145.6	55.0	1,500.0	970.0	450.0	3,000.0	13	12	8.0	1.0
HONG KONG								**Exchange rate: 0.1429 HK dollar**				
Leo Burnett Ltd.	Hong Kong	3,265.0	2,930.0	11.0	21,777.0	19,546.0	HK$22,848.0	HK$152,396.0	120	120	0.0	1
Young & Rubicam (HK)	Hong Kong	3,077.0	2,959.0	4.0	20,524.0	19,737.0	21,539.0	143,627.0	117	114	3.0	2
Ogilvy & Mather	Hong Kong	3,022.8	2,145.1	41.0	20,162.4	14,307.9	21,153.6	141,094.5	98	83	15.0	1
Ted Bates	Hong Kong	2,600.0	2,140.0	21.0	17,200.0	14,300.0	18,000.0	120,000.0	88	88	0.0	1
Ling-McCann-Erickson	Hong Kong	2,232.0	1,826.0	22.0	14,887.0	12,179.0	15,615.0	104,152.0	94	95	– 1.0	N/A
Far East Advertising Group	Hong Kong	1,742.0	1,643.0	6.0	10,495.0	9,744.0	12,187.0	73,442.0	108	110	– 2.0	3
Tse, Needham & Standard Advertising	Hong Kong	1,397.0	1,008.0	39.0	9,319.0	6,721.0	9,777.0	65,213.0	58	56	4.0	1
Meridian Advertising	Hong Kong	1,110.9	1,227.3	– 9.0	7,409.8	7,210.6	7,774.1	51,853.3	28	35	– 20.0	N/A
J. Walter Thompson Co.	Hong Kong	1,040.5	920.3	13.0	6,939.8	6,138.2	7,281.0	48,564.0	49	52	– 6.0	1
People & Grey Advertising	Hong Kong	1,030.9	954.4	8.0	6,876.0	6,366.0	7,214.0	48,117.4	40	38	5.0	1
Doyle Dane Bernbach	Hong Kong	1,015.0	800.0	27.0	6,767.0	5,331.0	7,100.0	47,350.0	44	50	– 12.0	1
Kenyon & Eckhardt	Hong Kong	865.3	929.7	– 7.0	5,771.8	6,201.0	6,055.6	40,390.6	51	53	– 4.0	1
Far East-Ketchum Advertising	Hong Kong	789.4	854.8	– 8.0	5,262.6	4,910.7	5,950.0	36,827.0	30	28	7.0	1
Foote, Cone & Belding	Hong Kong	783.7	761.7	3.0	5,227.0	5,080.7	5,484.0	36,578.0	38	33	15.0	1
BBDO Hong Kong	Hong Kong	667.7	660.2	1.0	4,527.1	4,430.1	4,672.4	31,680.3	32	27	19.0	1
D'Arcy MacManus Masius	Hong Kong	651.2	537.3	22.0	4,633.0	3,772.7	4,557.0	32,426.0	38	38	0.0	1
Wong Lam Ayer	Hong Kong	620.6	641.2	– 3.0	3,980.8	4,274.6	4,343.2	27,857.3	32	30	7.0	1
Results Ltd.	Hong Kong	547.3	416.2	32.0	3,650.4	2,776.3	3,829.9	25,545.5	24	18	33.0	1
SSC&B:Lintas	Hong Kong	514.0	195.0	164.0	3,455.0	1,302.0	3,596.0	24,175.0	19	17	12.0	1
Saatchi & Saatchi Compton	Hong Kong	510.9	562.4	– 9.0	3,296.4	2,793.5	3,575.5	23,067.5	32	39	– 18.0	1
Chuo Senko Advertising	Hong Kong	450.0	570.6	– 21.0	3,035.5	3,797.2	3,149.1	21,242.0	19	20	– 5.0	1
Dailey & Associates	Hong Kong	450.0	322.0	40.0	3,001.0	2,144.0	3,149.0	21,000.0	28	25	12.0	1
Synergie Communications	Hong Kong	87.0	N/A	N/A	580.0	N/A	608.8	4,058.8	10	N/A	N/A	1
ICELAND								**Exchange rate: 0.1429 kroner**				
Olafur Stephensen Advertising	Reykjavik	555.5	240.3	131.0	863.4	398.3	IKr16,398.6	IKr25,488.2	24	19	26.0	2
INDIA								**Exchange rate: 0.0997 rupee**				
Hindustan Thompson Associates	Bombay	4,164.5	4,126.6	1.0	27,444.5	27,191.8	Rs41,770.0	Rs275,270.9	633	624	1.0	5
Lintas India Ltd.	Bombay	3,233.0	2,341.0	38.0	21,566.0	15,617.0	32,431.0	216,314.0	215	199	8.0	4
Clarion Advertising	Calcutta	2,891.7	2,394.2	21.0	19,287.6	15,969.6	29,004.0	193,456.7	532	504	6.0	6
Ogilvy Benson & Mather	Bombay	1,875.0	1,494.0	26.0	12,507.0	9,967.0	18,810.0	125,494.0	283	266	6.0	5
Chaitra Advertising	Bombay	1,650.0	1,150.0	43.0	11,050.0	9,320.0	16,600.0	110,800.0	193	196	– 0.2	4
Advertising & Sales Promotion Co.	New Delhi	1,571.6	1,341.1	17.0	8,574.2	7,228.3	15,763.0	86,000.0	284	262	8.0	7
Ulka Advertising	Bombay	1,354.1	1,234.0	10.0	8,973.0	6,730.0	13,500.0	90,000.0	237	208	14.0	4
Jaisons Advertising	Bombay	1,125.7	978.9	15.0	7,096.3	6,160.0	11,291.3	71,176.5	148	103	44.0	7
Shilpi Advertising	Bombay	984.8	688.5	43.0	6,449.6	4,717.7	9,878.0	64,690.0	142	132	8.0	5
Grant Kenyon & Eckhardt	Bombay	921.4	878.9	5.0	6,142.6	5,859.5	9,241.6	61,610.7	143	144	– 0.7	5
National Advertising Service	Bombay	398.8	319.0	25.0	2,742.2	2,268.5	4,000.0	27,600.0	68	65	5.0	4
Newfields Advertising	New Delhi	382.0	346.9	10.0	2,544.3	2,313.0	3,828.0	25,520.0	75	72	4.0	5
Adverts Ltd.	Bombay	112.2	80.2	40.0	747.8	154.4	1,125.0	7,500.0	28	28	0.0	1

Not all the perfumes and colognes of the world can prevent the odour of sweat. And all of us sweat at least half a litre every day. What we need is a deodorant. To kill odour-causing bacteria and keep us fresh all day. Cinthol talc does just that.
Godrej
CINTHOL
DEODORANT
LUXURY
TOILET POWDER
Cinthol
luxury toilet powder

Chaitra Advertising
Bombay, India



BBDO Hong Kong
Hong Kong

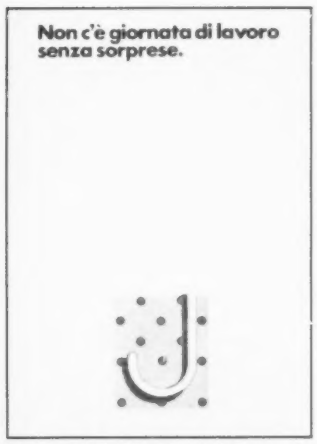
Ikon/DD/BBDO
Athens, Greece

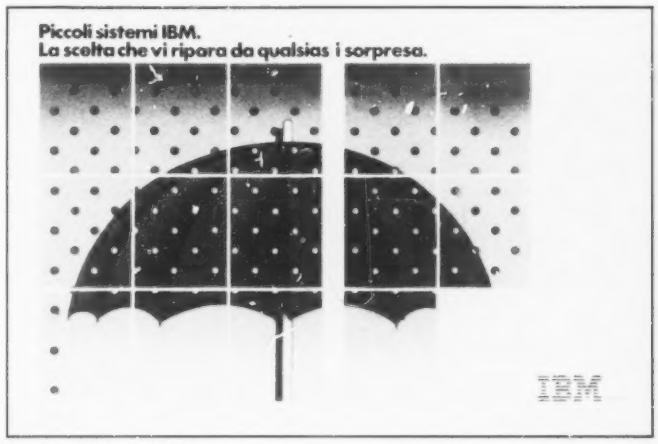
May-Tal Associated Advertising Services Ltd.
Tel Aviv, Israel

Agency	City	Gross income ($000) 1983	Gross income ($000) 1982	Per cent change	Billings ($000) 1983	Billings ($000) 1982	Gross income FOREIGN CURRENCY 1983	Billings FOREIGN CURRENCY 1983	Employes 1983	Employes 1982	Per cent change	offices
INDONESIA												**Exchange rate: 0.0012 rupiah**
P.T.Citra-Lintas Indonesia	Jakarta	1,630.0	1,440.0	13.0	10,872.0	9,605.0	Rup1.4 bill.	Rup9.1 bill.	65	N/A	N/A	1
P.T. Bates Kencana Indah	Jakarta	1,200.0	N/A	N/A	8,400.0	N/A	1.0 bill.	7.0 bill.	54	N/A	N/A	1
P.T. Perwanal Dimamika Mulya Mandiri	Jakarta	325.0	202.0	61.0	2,034.4	1,282.8	270,993.0	1.7 bill.	N/A	N/A	N/A	1
UMM-Thompson	Jakarta	217.0	295.1	26.0	1,250.5	1,265.8	180,851.0	1.1 bill.	27	25	8.0	1
IRELAND												**Exchange rate: 1.287 pound**
McConnells Advertising	Dublin	2,338.9	2,137.5	9.0	15,592.4	14,249.8	I£1,817.3	I£12,115.3	86	90	– 4.0	2
Wilson Hartnell Advertising & Marketing	Dublin	1,709.2	1,662.6	3.0	9,606.3	9,334.6	1,328.0	7,464.1	63	66	– 5.0	1
Bell Advertising	Dublin	1,294.0	1,354.7	4.0	7,262.5	7,719.4	1,005.5	5,643.0	46	51	– 10.0	2
Brian Cronin & Associates	Dublin	1,221.2	1,159.5	5.0	8,141.6	7,729.7	949.9	6,326.0	25	24	4.0	1
O'Keeffes	Dublin	1,200.0	1,068.3	12.0	6,932.7	6,171.9	932.4	5,386.7	28	26	8.0	2
Doherty Advertising	Dublin	751.1	573.4	31.0	8,548.3	6,525.2	583.6	6,642.0	N/A	24	N/A	1
Padbury Advertising	Dublin	269.2	188.9	43.0	4,452.1	3,124.3	209.2	3,459.3	N/A	14	N/A	1
ISRAEL												**Exchange rate: 0.0237 shekel**
Ariely Advertising	Tel Aviv	2,700.0	N/A	N/A	15,000.0	N/A	Sh113,923.8	Sh632,911.4	55	N/A	N/A	N/A
Wimmer, Jacobsohn, Tamir Advertising	Tel Aviv	2,100.0	N/A	N/A	10,000.0	N/A	88,608.0	590,717.3	48	N/A	N/A	N/A
Ovnat, Karmon, Shifrin & Naaman Ltd.	Tel Aviv	1,500.0	N/A	N/A	10,000.0	N/A	63,291.1	421,941.0	45	N/A	N/A	N/A
Pelled Advertising & Pr.	Tel Aviv	1,050.0	952.9	N/A	6,450.0	8,966.5	44,304.0	272,151.9	42	36	17.0	1
May-Tal Associated Advertising Services Ltd.	Tel Aviv	1,031.0	750.0	N/A	6,873.0	5,000.0	43,502.0	290,000.0	35	31	13.0	1
Aylon Advertising Ltd.	Tel Aviv	622.0	640.0	N/A	4,146.7	4,266.7	26,244.7	174,966.0	32	30	7.0	1
ITALY												**Exchange rate: 0.000677 lire**
McCann-Erickson Italiana	Milan	13,978.0	10,795.0	30.0	93,233.0	72,003.0	IL20.65 bill.	IL137.72 bill.	236	215	10.0	N/A
J. Walter Thompson Italia	Milan	10,458.4	8,815.4	19.0	73,771.1	62,176.2	15.45 bill.	108.97 bill.	176	167	5.0	2
Young & Rubicam Italia	Milan	8,060.0	6,567.0	23.0	54,000.0	43,802.0	11.90 bill.	79.76 bill.	124	119	4.0	2
Armando Testa	Turin	8,056.0	7,298.0	10.0	54,566.0	48,683.0	11.90 bill.	80.60 bill.	166	156	6.0	3
Foote, Cone & Belding	Milan	7,737.2	6,288.6	23.0	51,606.9	41,945.1	11.42 bill.	76.23 bill.	162	147	10.0	2
Italia/BBDO	Milan	7,718.0	5,382.0	43.0	51,452.0	35,881.0	11.40 bill.	76.00 bill.	97	65	49.0	6
ATA Univas	Milan	7,577.0	6,082.0	25.0	50,403.0	40,573.0	11.16 bill.	74.45 bill.	107	83	29.0	3
SSC&B:Lintas	Milan	6,051.6	4,590.1	30.0	43,416.3	32,850.6	8.94 bill.	64.13 bill.	113	108	5.0	1
TBWA Italy	Milan	6,032.0	4,934.0	22.0	43,328.0	32,908.0	8.90 bill.	64.00 bill.	104	102	2.0	1
Benton & Bowles Italy	Milan	4,282.0	2,422.3	77.0	28,561.1	16,156.6	6.33 bill.	42.19 bill.	99	66	50.0	3
Milano & Grey	Milan	4,265.1	3,278.7	30.0	30,771.0	23,457.4	6.30 bill.	45.45 bill.	72	66	9.0	2
Saatchi & Saatchi Compton Italia	Milan/Rome	4,133.1	2,996.0	38.0	27,555.0	19,971.0	6.10 bill.	40.7 bill.	75	70	7.0	2
Consumer Benefit Communication	Milan	3,894.1	2,768.9	41.0	25,963.0	18,448.3	5.75 bill.	38.35 bill.	62	45	38.0	2
Leader Pubblicita & Marketing	Florence	3,182.0	2,708.0	18.0	19,836.0	16,857.0	4.70 bill.	29.30 bill.	58	60	– 3.0	2
Livraghi, Ogilvy & Mather	Milan	3,087.3	1,957.3	58.0	20,311.4	13,059.4	4.60 bill.	30.00 bill.	71	51	39.0	2
D'Arcy MacManus Masius	Milan	2,989.8	2,466.8	21.0	19,941.6	16,453.0	4.42 bill.	29.46 bill.	49	49	0.0	2
CPV, Kenyon & Eckhardt Italiana	Milan	2,819.7	2,299.1	23.0	19,565.3	17,398.9	4.17 bill.	28.90 bill.	60	58	4.0	2
Publinter Ayer	Milan	2,810.0	2,600.0	8.0	19,770.0	15,910.0	4.16 bill.	29.20 bill.	61	N/A	N/A	2
MAC S.p.A.	Milan	2,772.8	2,458.0	13.0	19,879.9	16,235.0	4.10 bill.	29.33 bill.	36	36	0.0	2
B Communications	Milan	2,512.4	1,551.0	62.0	19,792.6	12,925.2	3.70 bill.	29.24 bill.	41	41	0.0	1

* With Israeli agencies, AA altered its procedure of determining an agency's "real growth" (applying 1983 exchange rate to 1982 returns) because it primarily shows the impact of inflation in that economy. Dollar figures for 1982 are based on the average annual exchange rate for that year.

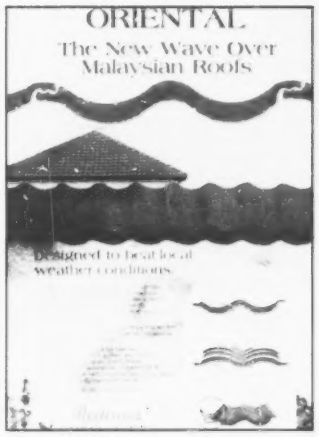
Agency	City	Gross income ($000) 1983	Gross income ($000) 1982	Per cent change	Billings ($000) 1983	Billings ($000) 1982	Gross income 1983 FOREIGN CURRENCY	Billings 1983 FOREIGN CURRENCY	Employes 1983	Employes 1982	Per cent change	offices
Troost Campbell-Ewald	Milan	2,498.0	1,929.0	20.0	16,662.0	12,866.0	3.69 bill.	24.61 bill.	43	43	0.0	N/A
P&T Pubblicita & Marketing	Milan	2,466.2	N/A	N/A	15,149.7	N/A	3.60 bill.	22.38 bill.	50	N/A	N/A	1
Leo Burnett Co.	Milan	2,218.0	1,164.0	91.0	14,793.0	7,764.0	3.28 bill.	21.85 bill.	47	39	21.0	1
INTHA Univas	Turin	2,085.0	1,474.0	42.0	15,097.0	8,699.0	3.08 bill.	22.30 bill.	40	38	5.0	2
Ted Bates & Co.	Milan	1,966.0	1,256.0	57.0	14,466.0	9,571.0	2.90 bill.	21.37 bill.	34	28	21.0	1
NCK/Italy	Milan	1,725.0	2,911.1	– 41.0	11,500.0	19,178.9	2.50 bill.	16.99 bill.	N/A	N/A	N/A	N/A
Intermarco-Farner Italia	Milan	1,347.0	1,126.0	20.0	8,986.0	6,759.0	2.00 bill.	9.98 bill.	23	25	– 8.0	1
Doyle Dane Bernbach Italia	Milan	1,301.0	984.0	32.0	8,672.0	6,562.0	1.90 bill.	12.80 bill.	21	21	N/A	1
Euro Advertising	Bologna	1,190.0	1,007.0	18.0	7,937.0	6,717.0	1.76 bill.	11.73 bill.	33	31	7.0	2
GGK Milano	Milan	844.0	999.0	– 8.0	5,619.0	6,635.0	1.25 bill.	8.30 bill.	10	14	– 29.0	1
Pubblı Dan Wirz	Milan	724.0	712.0	17.0	5,080.0	4,800.0	1.10 bill.	7.50 bill.	19	16	19.0	4
DFS Dorland Italia	Milan	697.3	339.8	106.0	4,649.0	2,347.1	1.00 bill.	6.87 bill.	30	27	11.0	2
Roncaglia & Wijkander	Rome	616.6	362.2	70.0	4,727.5	2,785.4	910,826.0	6.98 bill.	18	14	29.0	1
Emmer Pubblicita & Marketing	Rome	597.0	412.0	45.0	3,980.0	2,750.0	882,000.0	5.88 bill.	15	15	0.0	1
JAMAICA											**Exchange rate: 0.366 J dollar**	
Paisley, Kelly, Kenyon & Eckhardt	Kingston	784.6	N/A	N/A	5,233.4	N/A	J$2,143.8	J$14,299.0	25	23	9.0	1
Dunlop Corbin Compton Associates	Kingston	665.2	579.5	15.0	4,436.8	3,865.0	1,817.3	12,121.3	N/A	30	N/A	1
McCann-Erickson (Jamaica)	Kingston	602.0	452.0	33.0	4,015.0	3,015.0	1,643.0	10,959.0	39	34	15.0	N/A
CGR Communications Ltd.	Kingston	595.4	378.5	57.0	3,969.6	2,523.2	1,626.8	10,846.0	36	34	6.0	1
Lindo/NCK-Jamaica	Kingston	300.0	394.4	– 42.0	2,000.0	2,614.7	819.7	5,464.4	N/A	N/A	N/A	N/A
JAPAN											**Exchange rate: 0.004174 yen**	
Dentsu Inc.	Tokyo	437,720.0	418,320.0	5.0	3.21 bill.	3.03 bill.	Y104.87 bill.	Y770.06 bill.	5,582	5,493	2.0	37
Hakuhodo Inc.	Tokyo	180,194.0	164,600.0	9.0	1.35 bill.	1.22 bill.	43.17 bill.	324.10 bill.	2,685	2,567	5.0	18
Daiko Advertising	Osaka	59,849.0	55,357.3	8.0	472,413.0	426,767.0	14.34 bill.	113.18 bill.	1,436	1,469	– 2.0	38
Tokyu Advertising Agency	Tokyo	50,540.5	46,091.8	10.0	391,645.7	359,686.5	12.11 bill.	93.83 bill.	657	590	11.0	4
Dai-Ichi Kikaku	Tokyo	49,165.8	46,878.7	5.0	349,727.3	338,896.3	11.78 bill.	83.79 bill.	507	495	2.0	11
Yomiko Advertising	Tokyo	39,103.6	37,103.1	6.0	239,739.3	224,685.5	9.37 bill.	57.44 bill.	700	712	– 2.0	15
Asahi Kokoku-sha Co.	Tokyo	30,048.0	29,112.0	3.0	193,982.0	187,937.0	7.20 bill.	46.47 bill.	890	900	– 1.0	29
McCann-Erickson Hakuhodo	Tokyo	29,634.0	27,036.0	10.0	197,659.0	180,330.0	7.10 bill.	47.35 bill.	494	503	– 2.0	N/A
Asatsu Inc.	Tokyo	29,201.3	26,296.2	11.0	224,744.9	189,301.8	7.00 bill.	53.84 bill.	530	500	6.0	12
Dai-Ichi Advertising	Tokyo	25,252.7	25,587.0	– 1.0	176,468.0	172,850.0	6.05 bill.	42.28 bill.	513	500	3.0	11
Chuo Senko Advertising	Tokyo	22,570.0	22,000.0	3.0	145,450.0	137,590.0	5.40 bill.	34.85 bill.	320	320	0.0	9
Orikomi Advertising	Tokyo	19,224.7	19,138.4	1.0	167,689.8	165,314.8	4.60 bill.	40.17 bill.	374	370	1.0	5
Man-Nen-Sha	Osaka	16,626.7	15,802.6	5.0	224,880.6	178,333.7	3.98 bill.	53.88 bill.	489	495	– 1.0	12
Kyodo Advertising	Tokyo	15,952.0	14,356.5	11.0	106,353.5	95,709.8	3.80 bill.	25.48 bill.	370	366	1.0	9
J. Walter Thompson Japan Group	Tokyo	15,322.9	12,940.9	18.0	102,152.8	85,747.0	3.67 bill.	24.47 bill.	291	264	10.0	4
Nihon Keizaisha Advertising	Tokyo	14,414.9	12,789.6	13.0	88,083.9	80,460.1	3.45 bill.	21.10 bill.	393	388	1.0	10
Meitsu Advertising	Tokyo	11,754.0	11,019.4	7.0	85,216.0	79,890.4	2.80 bill.	20.40 bill.	255	260	– 2.0	7
Dentsu-Young & Rubicam	Tokyo	11,679.0	10,435.0	12.0	77,899.4	69,208.7	2.80 bill.	18.66 bill.	221	225	– 2.0	1
Tokyu Agency International	Tokyo	11,061.5	9,418.5	17.0	87,521.1	74,454.3	2.65 bill.	20.97 bill.	188	158	19.0	2
Osaka Yomiuri Advertising	Osaka	10,390.0	10,011.1	4.0	63,100.0	56,968.0	2.50 bill.	15.12 bill.	299	297	1.0	2
Standard Advertising	Tokyo	9,607.3	9,512.2	1.0	83,953.0	82,712.0	2.30 bill.	20.10 bill.	167	158	6.0	2
Nippon Design Center/DFS	Tokyo	7,676.0	6,581.0	17.0	51,196.2	43,894.7	1.80 bill.	12.27 bill.	180	180	0.0	1
Mainichi Advertising	Tokyo	6,922.0	6,572.4	10.0	50,464.6	50,265.5	1.66 bill.	12.09 bill.	176	175	– 0.6	4
Grey-Daiko Advertising	Tokyo	6,144.1	5,117.3	20.0	40,972.0	34,143.0	1.50 bill.	9.80 bill.	118	115	3.0	1
Dai-Ichi Tsushin-Sha	Tokyo	3,889.9	3,579.2	9.0	25,932.4	23,861.0	931,933.6	6.20 bill.	100	99	1.0	3
Toei Advertising	Tokyo	2,889.7	2,803.4	3.0	22,433.6	22,052.3	692,300.0	5.40 bill.	54	49	10.0	5
Asia Advertising Agency	Tokyo	2,462.7	2,228.9	10.0	10,564.4	9,410.0	590,000.0	2.53 bill.	56	58	– 3.0	1
Leo Burnett-Kyodo Co.	Tokyo	1,549.0	931.0	66.0	10,329.0	6,208.4	371,000.0	2.50 bill.	31	20	55.0	1
Ketchum Advertising (Japan)	Tokyo	1,480.7	1,132.8	31.0	9,871.4	7,552.0	353,887.0	2.36 bill.	26	22	18.0	1
Orikomi Bates	Tokyo	878.8	718.4	22.0	7,295.3	5,351.2	210,540.0	1.74 bill.	20	19	1.0	1
International Ad Co.	Osaka	516.5	513.1	1.0	5,524.0	4,900.0	123,737.3	1.30 bill.	10	10	0.0	1
Yomiko DFS International	Tokyo	326.6	489.0	– 33.0	1,837.5	3,661.9	78,247.6	440,215.1	14	17	– 18.0	1
Tokyo Senko-Dailey/Tokyo Senko Intl.	Tokyo	171.1	116.9	46.0	7,580.0	6,302.7	41,000.0	1.80 bill.	38	35	9.0	2
FCB (Japan) Co.	Tokyo	19.1	N/A	N/A	127.3	N/A	4,571.0	30,490.0	7	N/A	N/A	1
KENYA											**Exchange rate: 0.081 shilling**	
Ogilvy & Mather (EA)	Nairobi	801.9	768.1	4.0	5,348.4	5,041.4	KSh9,899.5	KSh66,029.7	48	48	0.0	1
McCann-Erickson (Kenya)	Nairobi	552.0	420.0	31.0	3,682.0	2,801.0	6,824.0	45,516.0	31	29	7.0	N/A
D'Arcy MacManus Masius	Nairobi	212.3	256.1	– 17.0	1,013.9	1,215.7	2,621.0	12,517.0	16	20	– 20.0	1
LEBANON											**Exchange rate: 0.2351 pound**	
Intermarkets S.A.L.	Beirut	7,200.0	6,512.0	11.0	46,100.0	40,180.0	Leb£N/A	Leb£N/A	210	185	14.0	8
H&C-Leo Burnett	Beirut	2,447.0	2,574.0	– 5.0	16,321.0	17,162.0	10,408.0	69,421.0	N/A	N/A	1.0	N/A
FCB Middle East	Beirut/Athens	687.1	1,148.1	– 40.0	4,583.0	7,657.6	2,923.0	4,883.3	17	20	– 15.0	2
Enterprise Middle East	New York/Athens	259.0	N/A	N/A	1,727.0	N/A	N/A	N/A	3	N/A	N/A	1
Madco Lebanon	Beirut	112.0	160.0	– 30.0	700.0	800.0	4,763.9	29,774.5	N/A	N/A	N/A	1
MALAWI											**Exchange rate: 0.900 kwacha**	
Graphic:Lintas Worldwide	Blantyre	175.0	101.1	72.0	1,128.0	653.0	Mkwa194.4	Mkwa1,253.4	18	18	0.0	1
MALAYSIA											**Exchange rate: 0.431 M dollar**	
Ogilvy & Mather (Malaysia)	Kuala Lumpur	3,624.0	2,773.0	31.0	24,172.0	18,498.0	M$8,409.0	M$56,088.0	159	154	3.0	1
Ted Bates (Malaysia)	Kuala Lumpur	2,300.0	1,900.0	21.0	15,000.0	13,000.0	5,300.0	35,000.0	74	76	– 3.0	1
PTM Thompson Advertising	Kuala Lumpur	2,207.0	2,196.0	0.1	15,085.0	15,085.0	5,121.0	35,000.0	117	139	– 16.0	2
Leo Burnett Co.	Kuala Lumpur	1,773.0	1,799.0	17.0	11,824.0	11,999.0	4,113.0	27,434.0	89	88	1.0	1





Saatchi & Saatchi Compton Italia, Milan/Rome

Standard Advertising
Tokyo, Japan



Ronald Quay
Kuala Lumpur, Malaysia

Livraghi, Ogilvy & Mather
Milan, Italy

Agency	City	Gross income ($000) 1983	Gross income ($000) 1982	Per cent change	Billings ($000) 1983	Billings ($000) 1982	Gross income FOREIGN CURRENCY 1983	Billings FOREIGN CURRENCY 1983	Employes 1983	Employes 1982	Per cent change	offices
SSC&B:Lintas	Kuala Lumpur	1,709.0	1,515.5	13.0	11,398.8	10,108.3	3,965.1	26,447.3	68	64	6.0	2
McCann-Erickson (Malaysia)	Kuala Lumpur	1,391.0	1,168.0	19.0	9,278.0	7,791.0	3,229.0	21,537.0	57	53	8.0	N/A
KHK Needham Standard	Kuala Lumpur	1,239.5	994.9	25.0	9,339.5	7,833.2	2,876.0	21,669.3	62	52	19.0	1
Wings Creative	Petaling Jaya	899.2	793.0	13.0	5,258.0	3,906.0	2,086.4	12,200.0	50	50	0.0	1
Young & Rubicam/Dentsu	Kuala Lumpur	839.0	41.0	1,946.0	5,596.0	273.0	1,946.0	12,983.8	29	13	123.0	1
AP Compton Malaysia	Kuala Lumpur	810.5	723.8	12.0	5,423.2	3,900.6	1,880.5	12,582.7	47	43	9.0	N/A
Flagbearer Meridian Advertising	Kuala Lumpur	441.6	303.3	46.0	2,945.2	2,022.7	1,024.5	6,833.4	24	23	4.0	N/A
Ronald Quay	Kuala Lumpur	431.9	416.6	4.0	3,745.6	3,732.5	1,002.0	8,690.0	40	42	5.0	1
MALTA											**Exchange rate: 2.36 pound**	
BPC International	Valletta	186.9	204.3	– 9.0	1,245.9	1,362.1	M£79.2	M£527.9	18	23	– 22.0	1
MEXICO											**Exchange rate: 0.0066 peso**	
Publicidad Ferrer	Mexico City	3,705.0	2,771.9	34.0	24,713.2	16,697.5	Ps561,385.0	Ps3.74 bill.	110	150	– 27.0	3
Noble y Asociados	Mexico City	2,760.6	1,975.5	40.0	19,291.8	13,176.3	418,273.0	2.92. bill.	278	232	20.0	2
McCann-Erickson	Mexico City	2,583.0	1,419.0	82.0	17,229.0	9,465.0	391,346.0	2.61 bill.	159	178	– 11.0	N/A
Walter Thompson de Mexico	Mexico City	2,147.0	2,005.0	7.1	14,313.0	8,967.0	325,308.0	2.17 bill.	147	162	– 9.0	N/A
Garcia Patto y Asociados	Mexico City	2,079.0	N/A	N/A	13,860.0	N/A	315,000.0	2.10 bill.	N/A	N/A	N/A	N/A
Panamericana Ogilvy & Mather	Mexico City	1,668.9	733.2	128.0	11,131.5	4,890.8	252,861.8	1.69 bill.	93	86	8.0	1
Leo Burnett	Mexico City	1,387.0	812.0	71.0	9,250.0	5,419.0	210,111.0	1.40 bill.	92	76	21.0	N/A
Young & Rubicam	Mexico City	1,329.0	761.0	75.0	8,864.0	5,076.0	201,370.0	1.34 bill.	90	82	10.0	1
Publicidad D'Arcy MacManus Masius	Mexico City	1,036.0	651.0	59.0	7,773.0	4,781.0	156,977.0	1.18 bill.	81	72	13.0	1
Doyle Dane Bernbach	Mexico City	903.0	414.0	118.0	6,129.0	2,878.0	136,849.0	928,608.0	76	72	6.0	1
Teran Publicidad	Mexico City	863.0	576.0	50.0	4,273.0	3,010.0	130,800.0	647,500.0	65	65	0.0	1
Maqueda Gibert/NCK Mexico	Mexico City	755.3	460.6	64.0	5,035.4	2,747.0	111,418.4	742,789.1	69	73	– 6.0	1
Iconic	Mexico City	700.0	366.3	91.0	4,666.7	2,442.0	105,000.0	700,000.0	70	59	19.0	1
Kenyon & Eckhardt de Mexico	Mexico City	687.0	169.3	306.0	4,485.7	1,747.2	104,086.9	679,659.0	42	36	17.0	1
Campbell-Ewald	Mexico City	610.0	427.0	43.0	4,069.0	2,846.0	92,407.0	616,355.0	45	52	– 14.0	N/A
La Compania Bozell & Jacobs	Mexico City	599.0	374.7	60.0	1,773.5	734.8	90,752.0	268,712.7	24	33	– 27.0	1
Hart, Scali, McCabe, Sloves	Mexico City	402.0	269.0	49.0	1,208.0	1,795.0	60,900.0	183,000.0	47	43	9.0	1
Alcazar Montenegro/Compton	Mexico City	268.7	148.5	81.0	1,791.2	990.0	40,708.1	271,387.1	31	26	19.0	1
Ideas y Hechos-Grey	Mexico City	230.2	81.1	184.0	1,535.0	540.4	34,885.9	232,572.8	24	18	33.0	1
FCB Mexico	Mexico City	221.8	142.8	56.0	1,479.5	952.3	33,608.0	224,165.0	29	29	0.0	1
SSC&B:Lintas (Mexico)	Mexico City	197.0	63.0	213.0	1,196.0	385.0	29,810.0	181,256.0	15	10	50.0	N/A
NAMIBIA											**Exchange rate: 0.903 rand**	
SSC&B: Lintas Namibia	Windhoek	25.7	35.1	– 27.0	144.4	203.7	R28.4	R159.9	1	1	0.0	1

Intermarco-Farner B.V.
Amsterdam, Netherlands

D.J. Keymer & Co.
Karachi, Pakistan

Bates-gruppen a/s, Oslo, Norway

Agency	City	Gross income ($000) 1983	Gross income ($000) 1982	Per cent change	Billings ($000) 1983	Billings ($000) 1982	Gross income 1983 (FOREIGN CURRENCY)	Billings 1983 (FOREIGN CURRENCY)	Employes 1983	Employes 1982	Per cent change	offices
NETHERLANDS												**Exchange rate: 0.3588 guilder**
SSC&B: Lintas Advertising	Rotterdam	6,250.4	6,085.2	3.0	43,853.0	42,915.2	Dfl 17,420.3	Dfl1 22,221.2	122	123	– 0.08	2
FHV/BBDO	Amstelveen	5,987.0	6,023.9	– 0.6	39,172.1	39,417.8	16,086.3	109,175.2	96	108	– 11.0	1
Ogilvy & Mather	Amsterdam	5,829.2	5,276.8	10.0	38,881.0	35,196.6	16,246.5	108,363.9	126	104	21.0	4
McCann-Erickson (Nederland)	Amsterdam	5,176.0	4,645.0	11.0	34,524.0	30,982.0	14,428.0	96,235.0	95	96	– 0.01	N/A
Prad B.V.	Amsterdam	5,123.7	5,224.0	– 2.0	34,158.0	34,824.0	14,260.0	95,200.0	59	65	– 9.0	1
Young & Rubicam-Koster Holdings	Amsterdam	4,781.0	4,304.5	11.0	31,856.0	28,681.0	13,325.0	88,782.7	100	88	14.0	2
ARA Advertising & Marketing	Rotterdam	4,780.0	4,581.9	4.0	36,662.0	30,578.0	13,322.0	88,858.0	N/A	N/A	N/A	3
Noordervliet & Winninghoff/Burnett	Amsterdam	4,664.4	3,927.0	19.0	31,112.0	26,191.0	13,000.0	86,710.0	72	75	– 4.0	2
Result D'Arcy MacManus Masius	Amsterdam	4,446.0	4,095.0	9.0	29,650.0	27,292.0	12,390.0	82,640.0	72	73	– 1.0	1
Prins Meijer, Stamenkovits & van Walbeek	Amsterdam	4,420.4	3,766.0	17.0	29,435.0	25,093.0	12,312.0	82,035.3	54	50	8.0	1
NPO Univas	The Hague	4,305.6	3,955.8	9.0	27,893.0	26,371.0	12,000.0	80,000.0	68	68	0.0	1
J. Walter Thompson Co.	Amsterdam	4,099.3	4,038.3	2.0	28,736.2	26,935.4	11,425.0	80,089.8	85	95	– 11.0	2
Intermarco-Farner B.V.	Amsterdam	3,954.0	3,875.0	2.0	26,372.0	25,905.0	11,020.0	73,500.0	78	74	5.0	2
PPGH/Moussault	Amsterdam	3,567.2	2,668.0	34.0	23,681.0	17,940.0	9,942.0	66,000.0	44	44	0.0	1
Geudeker Oerlemans & Needham	Amstelveen	3,040.6	2,098.3	45.0	20,520.4	13,993.2	8,474.5	57,191.9	42	39	8.0	1
R.V. Wiggert de Vries & Franssen/DDB	Amsterdam	2,837.0	1,382.5	105.0	18,837.0	9,580.0	7,906.0	52,500.0	50	30	67.0	1
HVR Advertising	Amstelveen	2,727.2	2,560.0	7.0	18,191.2	17,078.9	7,601.0	50,700.0	49	50	– 2.0	2
RJA	Amsterdam	2,470.0	2,772.0	– 11.0	15,787.0	18,657.0	6,885.0	44,000.0	53	63	– 16.0	1
Benton & Bowles Advertising	Amsterdam	2,464.7	2,069.0	19.0	16,431.6	13,793.3	6,869.4	45,796.0	49	43	14.0	1
Saatchi & Saatchi Compton	Amsterdam	2,217.4	1,837.4	21.0	14,782.6	13,091.7	6,180.0	41,200.0	43	43	0.0	1
Marketwinning Ayer	Amsterdam	2,042.0	1,959.0	4.0	13,039.0	13,038.0	5,690.0	38,849.0	35	38	– 8.0	3
Grey Netherlands	Amsterdam/Baarn	1,664.6	1,644.7	1.0	11,899.7	11,466.3	4,639.3	33,165.4	25	24	4.0	1
Allick B.V.	Amsterdam	1,630.7	1,388.6	17.0	10,872.0	9,257.0	4,545.0	30,300.0	28	25	12.0	N/A
GGK Amsterdam/KVH	Amsterdam	1,620.0	1,996.0	– 19.0	10,929.0	13,428.0	4,514.0	30,460.0	28	31	– 10.0	1
Ted Bates Reclame Adviesbureau	Amsterdam	1,448.2	1,667.1	– 13.0	11,262.0	13,040.4	4,036.2	31,388.1	34	36	– 6.0	1
De Bussy Reclame	Amsterdam	1,297.0	1,238.0	5.0	8,647.0	8,253.0	3,615.0	24,100.0	32	40	– 20.0	1
Foote, Cone & Belding	Amsterdam	1,294.2	1,939.3	– 33.0	8,633.0	12,935.0	3,607.0	24,060.0	22	38	– 42.0	1
NCK/Netherlands	Amsterdam	1,200.0	1,085.0	11.0	8,000.0	7,664.0	3,344.4	22,296.0	N/A	N/A	N/A	N/A
Van Lieshout & Van Hemert/FCB	Rotterdam	1,045.7	942.6	11.0	6,975.1	6,287.5	2,914.6	19,440.2	20	18	11.0	1
TBWA Netherlands	Amsterdam	1,005.0	1,006.0	N/A	7,535.0	6,708.0	2,800.0	21,000.0	22	20	10.0	1
Campbell-Ewald Nederland	Amsterdam	780.0	1,252.0	– 38.0	5,203.0	8,351.0	2,174.0	14,501.0	22	27	– 19.0	N/A
Paradies Advertising	Amsterdam	719.0	767.8	– 6.0	4,793.6	5,344.2	2,004.0	13,360.0	16	14	14.0	1
Jan Moerbeek/Marco Klein	Amsterdam	563.0	477.0	18.0	3,770.0	3,190.0	1,570.0	10,500.0	11	10	10.0	1
DFS Holland	Amsterdam	549.2	572.5	– 4.0	3,404.7	3,982.6	1,530.5	9,488.9	14	14	0.0	1
Kastelein Adviesbureau	Soest	222.9	225.9	– 1.0	1,507.0	1,573.0	621.1	4,200.0	7	6	17.0	1
NEW ZEALAND												**Exchange rate: 0.6779 NZ dollar**
Colensc Communications	Auckland	4,191.2	4,130.0	1.0	20,734.9	19,939.7	NZ$6,182.6	NZ$30,586.9	N/A	N/A	N/A	2
J. Inglis Wright	Wellington	2,882.5	2,998.3	– 4.0	17,269.7	15,098.8	4,252.2	25,475.3	80	78	3.0	3
D'Arcy MacManus Masius	Auckland	2,400.0	1,924.0	25.0	12,463.0	10,187.0	3,540.0	18,385.0	59	52	13.0	2
Ogilvy & Mather (N.Z.)	Auckland	1,608.4	1,650.4	– 3.0	5,466.4	5,609.9	2,372.6	8,063.7	68	60	13.0	2
Leo Burnett Co.	Auckland	1,569.0	1,379.0	14.0	10,463.0	9,197.0	2,314.0	15,434.0	N/A	N/A	N/A	1
Rialto Advertising	Auckland	1,418.1	1,027.9	38.0	7,170.6	5,029.4	2,091.9	10,577.6	N/A	N/A	N/A	2
MDA Mackay King Advertising	Wellington	1,277.6	1,218.3	5.0	6,388.0	6,118.9	1,884.6	9,423.2	33	33	0.0.	1
SSC&B:Lintas	Auckland	1,228.0	950.0	29.0	5,982.0	4,680.0	1,812.0	8,825.0	36	36	0.0	2
MacHarman Ayer	Auckland	866.7	897.5	– 3.0	3,720.3	3,958.2	1,278.5	5,488.1	28	33	– 15.0	1
USP Needham	Wellington	728.0	666.7	9.0	3,593.0	4,028.5	1,073.8	5,300.2	21	21	0.0.	2
Ward & Grey	Auckland	469.1	387.1	21.0	2,346.0	1,935.0	692.0	3,460.0	11	11	0.0	1
Atelier Advertising	Auckland	458.8	N/A	N/A	2,293.9	N/A	676.8	3,383.9	N/A	N/A	N/A	1
Wood & Mitchell	Wellington	217.0	N/A	N/A	1,447.7	N/A	320.2	2,135.6	12	12	0.0	2

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983	Billings 1983	Employes 1983	1982	Per cent change	offices
							FOREIGN CURRENCY					
NICARAGUA								Exchange rate: 0.100 cordoba				
APCU de Nicaragua	Managua	30.0	5.2	477.0	200.0	36.2	Cor300.0	Cor2,000.0	3	2	50.0	1
Publicidad McCann-Erickson	Managua	N/A	41.0	N/A	N/A	273.0	N/A	N/A	0	0	0.0	1
NIGERIA								Exchange rate: 1.40 naira				
Lintas (Nigeria)	Lagos	3,400.2	3,886.4	– 13.0	19,068.1	22,351.6	Nai2,428.7	Nai13,620.1	165	157	5.0	1
NORWAY								Exchange rate: 0.1377 kroner				
Bates-gruppen a/s	Oslo	13,222.2	11,502.0	15.0	89,991.0	74,270.0	NKr96,020.0	NKr653,529.0	349	343	3.0	6
Forenede Group of Agencies	Oslo	11,704.5	9,914.4	18.0	73,000.0	63,066 6	85,000.0	530,000.0	285	285	0.0	10
Ervaco Oslo A/S	Oslo	5,306.0	2,668.6	99.0	35,391.0	17,799.8	38,532.2	257,009.4	60	72	– 17.0	N/A
Ogilvy & Mather Norway	Oslo	3,318.5	2,647.8	25.0	22,134.1	17,660.8	24,099.2	160,741.4	60	55	9.0	2
A/S Benton & Bowles/HO	Oslo	2,710.0	2,520.0	8.0	19,950.0	18,200.0	19,700.0	144,910.0	65	65	0.0	1
Scaneco-Young & Rubicam	Oslo	2,578.0	2,029.0	27.0	17,195.0	13,533.0	18,716.0	124,870.1	55	49	12.0	1
Inter-Media Norway	Oslo	1,906.0	N/A	N/A	35,284.0	N/A	13,841.4	256,232.4	N/A	N/A	N/A	1
McCann-Erickson A/S	Oslo	1,870.0	1,463.0	28.0	12,473.0	9,758.0	13,582.0	90,592.0	33	30	10.0	N/A
Master A/S	Oslo	1,845.7	1,797.0	3.0	12,304.9	11,979.9	9,382.6	89,360.0	23	22	5.0	4
Jensen & Borkenhagen A/S	Oslo	1,670.2	1,376.2	21.0	11,548.1	9,488.0	12,129.1	83,864.0	21	20	5.0	1
A/S Myres/Lintas	Oslo	1,265.9	1,069.8	18.0	17,578.8	16,368.2	9,193.2	127,660.1	72	75	– 4.0	4
Young & Rubicam AS	Oslo	1,104.0	732.0	51.0	7,364.0	4,882.0	8,015.0	53,477.4	24	22	9.0	1
Pran & Torgerson	Oslo	1,014.0	983.1	3.0	8,103.3	7,080.1	7,363.7	58,846.2	N/A	23	N/A	1
Jensen/Grey	Oslo	904.4	774.3	17.0	6,032.0	5,164.0	6,568.0	43,808.0	20	19	5.0	1
NCK/Norway	Oslo	900.0	1,054.6	– 15.0	6,000.0	7,030.4	6,535.8	43,572.0	N/A	N/A	N/A	N/A
D'Arcy MacManus Masius	Oslo	617.2	670.5	8.0	4,100.8	4,457.5	4,482.0	29,781.0	17	16	6.0	1
B.S. Kverneland A/S	Oslo	371.8	423.4	– 12.0	2,478.6	2,822.9	2,699.9	18,000.0	20	18	11.0	1
J.T.K.A/S	Oslo	230.0	162.5	42.0	1,616.3	1,181.1	1,670.0	11,738.0	6	6	0.0	1
PAKISTAN								Exchange rate: 0.0778 rupee				
D.J. Keymer & Co.	Karachi	277.5	240.0	16.0	1,850.0	1,600.0	R3,567 0	R23,779.0	28	25	12.0	1
Prestige Advertising	Karachi	194.3	182.4	7.0	1,358.5	1,307.7	2,496.9	17,461.2	46	42	10.0	2
R:Lintas (Pakistan)	Karachi	N/A	506.0	N/A	N/A	3,696.0	N/A	N/A	71	71	0.0	N/A
PANAMA								Exchange rate: 1.00 dollars				
Campagnani, Aleman Publicidad	Panama City	1,462.3	1,348.4	9.0	5,040.4	4,827.7	1,462.3	5,040.4	41	37	11.0	1
Boyd, Barcenas	Panama City	1,346.5	1,228.0	10.0	5,300.0	5,000.0	1,346.5	5,300.0	40	37	8.0	1
McCann-Erickson de Panama	Panama City	1,248.0	1,055.0	18.0	8,324.0	7,037.0	1,248.0	8,324.0	45	43	5.0	N/A
Publicidad Velmor	Panama City	191.6	225.0	– 15.0	1,277.3	1,500.0	191.6	1,277.3	N/A	N/A	N/A	1
APCU de Panama	Panama City	180.0	150.0	20.0	1,200.0	1,000.0	180.0	1,200.0	12	10	20.0	1
PARAGUAY								Exchange rate: 0.0062 guarani				
J. Walter Thompson Paraguay	Asuncion	156.4	206.9	– 24.0	1,043.2	1,380.2	Gua25,226.1	Gua168,157.8	9	9	0.0	1
McCann-Erickson (Paraguay)	Asuncion	133.0	212.0	– 37.0	887.0	1,414.0	21,495.0	143,372.0	10	15	– 33.0	N/A
PERU								Exchange rate: 0.00117 sol				
J. Walter Thompson Peruana	Lima	2,826.2	1,453.0	95.0	18,850.4	9,691.7	Soles2.42 bill.	Soles16.10 bill.	95	89	7.0	1
McCann-Erickson Publicidad	Lima	2,336.0	1,171.0	99.0	15,581.0	7,811.0	2.00 bill.	13.32 bill.	76	77	– 1.0	N/A
Forum	Lima	1,358.4	965.3	41.0	9,009.0	6,435.0	1.16 bill.	7.70 bill.	80	90	– 11.0	1
Publicistas Asociados	Lima	965.3	575.0	68.0	6,435.0	3,833.0	825,042.7	5.00 bill.	52	48	8.0	1
Compania Nacional de Publicidad	Lima	791.0	418.7	89.0	5,273.2	2,791.1	676,052.0	4.50 bill.	71	60	18.0	1
PHILIPPINES								Exchange rate: 0.09918 peso				
J. Walter Thompson Co.	Manila	2,758.3	2,169.6	27.0	18,388.9	14,463.8	Ps27,811.4	Ps185,409.2	210	197	7.0	1
Advertising & Marketing Associates	Manila	1,862.2	1,236.2	51.0	12,414.6	8,241.2	18,775.9	125,172.6	187	155	21.0	1
McCann-Erickson (Philippines)	Manila	1,784.0	1,404.0	27.0	11,899.0	9,365.0	17,987.0	119,973.0	128	127	0.8	N/A
Bates-Alcantara (Philippines)	Manila	1,752.0	1,208.0	45.0	11,577.0	8,050.0	17,660.0	117,733.0	123	107	15.0	1
Ace-Compton Advertising	Manila	1,356.9	1,346.3	0.7	9,045.9	8,979.8	13,681.1	91,207.2	132	160	– 18.0	1
CA-Lintas (Philippines)	Manila	566.8	446.3	27.0	3,826.7	2,977.2	5,714.6	38,583.2	44	32	38.0	1
Philprom Inc.	Pasay City	507.6	567.4	– 11.0	3,383.7	4,512.1	5,117.5	34,116.7	88	93	– 5.0	2
Hemisphere-Leo Burnett Inc.	Manila	459.0	355.0	29.0	3,058.0	2,370.0	4,623.0	30,835.0	45	47	– 4.0	1
PORTUGAL								Exchange rate: 0.0097 escudo				
Ciesa/NCK	Lisbon	1,455.0	1,189.8	22.0	9,700.0	7,932.3	Esc150,000.0	Esc1.00 bill.	N/A	N/A	N/A	N/A
McCann-Erickson-Hora Publicidade	Lisbon	1,314.0	1,016.0	29.0	8,764.0	6,777.0	135,461.0	903,592.0	60	58	4.0	1
Intermarco Espiral	Lisbon	1,306.0	1,015.0	29.0	6,606.0	5,296.0	134,600.0	681,000	66	69	– 4.0	1
Sistema	Lisbon	864.0	727.0	19.0	4,320.0	3,395.0	89,069.8	445,348.8	44	44	0.0	1
Lintas Lisbon	Lisbon	808.0	732.0	11.0	5,721.0	4,620.0	83,344.0	589,923.0	56	56	0.0	1
Team	Lisbon	713.0	570.0	25.0	4,753.0	5,020.0	73,500.0	490,000.0	57	58	– 2.0	2
Latina	Lisbon	393.3	257.2	53.0	1,967.1	1,225.9	40,591.0	202,792.1	32	29	10.0	1
FCB Portugal	Lisbon	378.8	235.6	61.0	2,526.4	1,571.5	39,048.0	260,450.0	29	27	7.0	1
Unitros Portugal	Lisbon	349.2	192.6	82.0	1,940.0	1,325.8	36,000.0	200,000.0	21	18	17.0	1
J. Walter Thompson Publicidade	Lisbon	234.6	92.2	155.0	1,652.3	569.4	24,182.0	170,343.0	18	14	29.0	1
PUERTO RICO								Exchange rate: 1.00 dollar				
Marti, Flores, Prieto, Comunicaciones	San Juan	6,780.7	6,239.7	9.0	45,227.0	41,181.9	6,780.7	45,227.0	122	116	5.0	5
Badillo/Compton	San Juan	4,500.0	3,700.0	22.0	30,000.0	25,000.0	4,500.0	30,000.0	93	83	12.0	1

1984 EDITION **FOREIGN AGENCY INCOME** PUERTO RICO-SOUTH AFRICA

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983	Billings 1983	Employes 1983	1982	Per cent change	offices
							FOREIGN CURRENCY					
Young & Rubicam Puerto Rico	San Juan	3,654.0	3,481.0	5.0	24,372.0	23,218.0	3,654.0	24,372.0	79	70	13.0	1
Publicidad Siboney	Santurce	1,900.2	1,800.0	6.0	12,668.2	12,000.0	1,900.2	12,668.2	N/A	N/A	N/A	N/A
BBDO Puerto Rico	San Juan	1,716.0	1,239.2	38.0	11,440.0	8,261.0	1,716.0	11,440.0	22	22	0.0	1
Leo Burnett	San Juan	1,624.0	1,418.0	15.0	10,832.0	9,454.0	1,624.0	10,832.0	39	32	22.0	1
McCann-Erickson (Puerto Rico)	San Juan	1,576.0	1,587.0	1.0	10,512.0	10,585.0	1,576.0	10,512.0	44	49	– 10.0	N/A
FCB/Espasas Advertising	San Juan	1,354.7	1,041.5	30.0	9,035.9	6,946.6	1,354.7	9,035.9	36	30	20.0	N/A
Alpha Communications Group	San Juan	460.0	320.0	44.0	2,300.0	1,600.0	460.0	2,300.0	12	7	71.0	1
SAUDI ARABIA											**Exchange rate: 0.2895 ryal**	
Saudi Advertising	Jeddah	3,240.9	3,484.8	– 7.0	12,451.2	13,990.1	Ry11,194.1	Ry43,006.4	N/A	118	N/A	3
Madco Saudi Arabia	Al Khobar	301.0	232.0	30.0	1,300.0	1,000.0	1,039.7	4,490.5	N/A	N/A	N/A	1
SINGAPORE											**Exchange rate: 0.472 S dollar**	
Batey Ads	Singapore	2,454.0	2,668.0	– 8.0	10,516.0	12,900.0	S$5,200.0	S$22,280.0	62	62	0.0	1
Ogilvy & Mather	Singapore	2,206.0	2,362.0	– 7.0	14,712.0	15,757.0	4,673.0	31,169.0	74	88	– 16.0	N/A
Young & Rubicam	Singapore	1,817.0	1,644.0	11.0	12,119.0	10,965.0	3,852.0	25,675.3	62	61	2.0	2
Leo Burnett Ltd.	Singapore	1,684.0	1,476.4	14.0	11,230.0	9,848.0	3,567.0	23,797.0	54	51	6.0	1
Grant Kenyon & Eckhardt	Singapore	1,587.8	1,557.6	2.0	11,800.0	10,997.0	3,364.0	25,000.0	76	76	0.0	1
McCann-Erickson (Singapore)	Singapore	1,517.5	923.2	64.0	10,118.0	6,156.0	3,215.0	21,444.0	52	42	24.0	N/A
Quantum:FCB Advertising	Singapore	1,397.5	513.6	172.0	9,321.0	3,425.8	2,960.7	19,747.9	42	33	27.0	3
Gartshore Kerr & Lim/BBDO	Singapore	1,150.9	679.0	69.0	6,661.0	4,157.8	2,438.3	14,112.2	54	33	64.0	1
SSC&B:Lintas S.E. Asia	Singapore	1,128.0	1,142.0	– 1.0	8,009.0	8,109.0	2,390.0	16,968.0	32	33	– 3.0	1
Needham Standard Advertising	Singapore	944.5	842.6	12.0	6,025.4	5,620.2	2,001.0	12,765.7	41	44	– 7.0	1
Ted Bates	Singapore	850.0	660.0	29.0	5,700.0	4,500.0	1,800.0	12,000.0	44	37	19.0	1
Adcom & Grey	Singapore	836.4	762.8	10.0	4,300.4	3,931.8	1,772.1	9,111.0	33	31	6.0	N/A
Saatchi & Saatchi Compton	Singapore	751.9	712.7	6.0	4,507.6	4,229.8	1,592.9	9,550.0	34	33	3.0	1
J. Walter Thompson	Singapore	733.7	626.0	17.0	4,893.9	4,095.9	1,554.5	10,368.3	34	34	0.0	1
Meridian Advertising	Singapore	634.9	393.8	61.0	4,235.0	2,626.5	1,345.2	8,972.6	22	23	– 4.0	1
Tom Tan Associates	Singapore	570.2	353.5	61.0	2,459.0	1,508.0	1,208.0	5,210.0	21	16	31.0	3
Adsell/D'Arcy MacManus Masius	Singapore	259.0	116.0	123.0	1,995.0	1,521.0	549.0	4,227.0	16	22	– 27.0	1
SOUTH AFRICA											**Exchange rate: 0.90799 rand**	
BBDO South Africa	Johannesburg	17,376.2	12,981.5	34.0	115,841.4	86,543.3	R19,137.0	R127,580.0	N/A	N/A	N/A	12

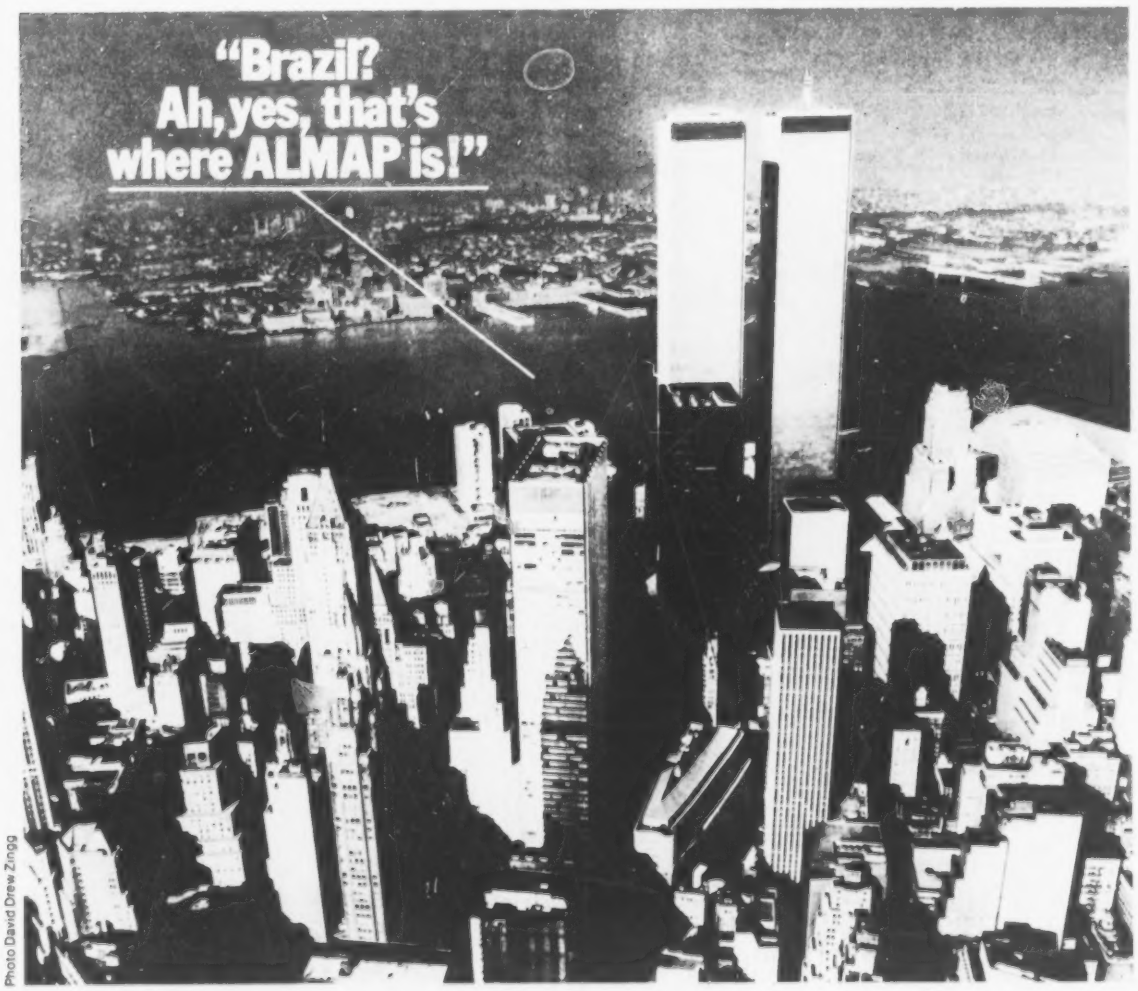


Photo David Drew Zingg

ALMAP is the world's 36th ranking agency. Second in Brazil, for now. It's one of the fastest growing agencies in the world.

But we're not satisfied with this. We're ambitious, just as our clients are.

They include some of the world's best-known companies.
Alcoa • Anderson Clayton • Avianca • Braun • Consul (Whirlpool) • Dannon • Embratur (Brazilian Dept. of Tourism) • Fleischmann-Royal (Nabisco Brands) • Gillette • General Foods • Merck • National Panasonic • Pan Am • Pepsico Foods • Petrobrás • Polaroid • Rhône-Poulenc • Ralston-Purina • Stock Distillerie • Volkswagen.

And if you've ever seen the Clio, Sawa or New York Festival reels, you've seen the work ALMAP does for them. It's Brazil's #1 in international awards.

Why are we telling you this? Because we want to sell your products in Brazil. Everything we know about Brazil, its market and consumers is available to you.

Phone or write to us.

Almap Alcantara Machado Periscinoto Comunicações Ltda.

Av. Paulista, 688 · São Paulo 01310 · Brazil
Phone: 289-1122 · Cable: Advertising São Paulo
Telex: SPO 01.124.094

Notes to individual agency listings

(Continued from Page 58)

1984. Agency is 100% owned by Saatchi & Saatchi Group U.K.
Fletcher Shelton Delaney part of Ted Bates Worldwide.
Geers Gross Advertising Ltd. figures cover the two London offices of Geers Gross, but not the New York office.
KMP Partnership part of Saatchi & Saatchi Compton Worldwide.
LansdownEuro part of JWT Group.
Lowe Howard-Spink Campbell-Ewald merged September, 1983, with Interpublic Group of Cos., which holds 45% equity in the merged agency. For 1983, LHS had gross income of $4.6 million on billings of $36.9 million; Wasey Campbell-Ewald had gross income of $7 million on billings of $44.9 million.
Marsteller Ltd. billings figure for 1983 is an AA estimate.
Michael Bungey & Partners part of DFS Intl. As of March, 1984, the agency became part of Dorland/DFS Int'l., a pan-European consortium based in London.
Moxon, Dolphin & Kerby part of Ted Bates Holdings Ltd.
Nicklin Advertising Ltd. gross income figures for both years are AA estimates.
Royds Advertising Group figures include Royds London and Manchester, and offices in Bristol, Birmingham, Wales, and South West, Woolward Royds, Stowe and Bowden, Extel Advertising and PR, Belfast Progressive Advertising and others.
Saatchi & Saatchi Group U.K. includes Downton Advertising, Halls Edinburgh, Saatchi Manchester, RPG Gloucester, O'Kennedy Brindley Dublin, Garrott Dorland, Crawford Holdings and Sales Promotion Agency.
Young & Rubicam Holdings does not report billings. Figures are AA estimates. Y&R Holdings reports consolidated gross income for Y&R, Wunderman, Ricotta & Kline, Sudler & Hennessey, Marsteller and Burson-Marsteller.

CANADA

Carder Gray Advertising formed in 1983.
Cossette Communication-Marketing branch offices in Montreal and Toronto.
Enterprise Advertising Associates part of J. Walter Thompson.
Foster Advertising figures include Foster's associated and affiliated companies.
Goodis-Wolf formed by merger of Wolf Advertising Ltd. and The Jerry Goodis Agency.
Grey Ronalds Smith Ltd. (Canada), owned by Grey Canada, began operations in July 1983. Figures are for six months.
Young & Rubicam does not report billings. Figures are AA estimates. Y&R Canada reports consolidated gross income for Y&R, Wunderman, Ricotta & Kline, Marsteller and Burson-Marsteller (the latter for 1982 only).

CHILE

Promoplan part of Ogilvy & Mather Intl.
Sertec Inter-Americana affiliated with Kenyon & Eckhardt Intl.
Young & Rubicam de Chile does not report billings. Figures are AA estimates.

CHINA

McCann-Erickson Jardine (China) figures expressed in Hong Kong dollars.

COLOMBIA

Centrum Publicitario associated with Ogilvy & Mather Intl.
Contacto Publicidad part of DFS Intl.
Epoca Publicidad affiliated with Kenyon & Eckhardt Intl. did not report.
Jaime Uribe gross income for 1983 and 1982 estimated by AA.

COSTA RICA

Publicidad Siboney associated with NCK Intl., which became part of Foote, Cone & Belding Intl. Jan. 1984.

DENMARK

a-reklame a/s gross income figures are estimated by AA.
Bergenholz & Arnesen I/S part of DFS Intl.
Egeberg & Vinding Advertising part of Kenyon & Eckhardt Intl.
Ipsen & Parmo billings are AA estimates.
NP/Grey office opened in July, 1983.
Young & Rubicam does not report billings. Figures are AA estimates. Y&R Denmark reports consolidated gross income for Y&R, Wunderman, Ricotta & Kline and Cato Johnson.

DOMINICAN REPUBLIC

Publicidad Siboney associated with NCK Intl, which became part of Foote, Cone & Belding Intl. Jan., 1984.
Young & Rubicam Damaris does not report billings. Figures are AA estimates.

ECUADOR

Publicidad Artefilme part of NCK Intl, which became part of Foote, Cone & Belding Intl. Jan., 1984.
Publicitas affiliated with Kenyon & Eckhardt Intl. did not report.
Veritas Publicitaria part of Ogilvy & Mather Intl.

FINLAND

Lahti-Mainos Oy gross income figures for 1983 are estimates.
Markkinointi Topitorma Oy is part of the Publicis Intermarco-Farner network.
Oy Mainos Taucher Reklam Ab 1983 gross income is estimated.
Tehomainos Oy gross income is estimated by AA.

FRANCE

Agence A part of Dailey International Group, which became part of the Interpublic Group of Cos.
Alice part of Belier Groupe/EUROCOM/Univas.
Ted Bates S.A. does not provide billings figures.
Belier Conseil, part of EUROCOM/Univas network. Belier Group consists of Belier Conseil, Alice, Taurus, INF.14, Business, Bombe, five specialized agencies and five provincial agencies and Promostyl. Belier Group also has 3% equity in Foote, Cone & Belding (after its acquisition of NCK in Jan. 1984).
Campagne part of EUROCOM/Havas Conseil.
Compar part of Saatchi & Saatchi Compton Worldwide.
CPV Paris affiliated with Kenyon & Eckhardt Intl.
D.10 part of EUROCOM/Havas Conseil.
Dupuy-Compton & Associes part of Saatchi & Saatchi Compton Worldwide.
Eldorado part of EUROCOM/Univas.
Euro-Advertising, Lyon, part of JWT Group.

(Continued on Page 77)

If You Were A Businessman in Saudi Arabia, This is The Paper You'd Read Every Day.

The Saudi Gazette is read by more businessmen than any other English language Saudi Arabian Daily.

It's by far the best and most cost effective way towards successful selling in the world's most lucrative market.

We talk business.

So start talking right now, call

Saudi Advertising الاعلان السعودي

(Sole representative)

Jeddah 6650380 or 6602286. Telex: 402229 ADVERT SJ.
Or write to us at, P.O. Box 6557, Jeddah, Saudi Arabia

SAUDI GAZETTE
SAUDI ARABIA'S NATIONAL DAILY

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983 FOREIGN CURRENCY	Billings 1983	Employes 1983	1982	Per cent change	offices
Grey Holdings Ltd.	Johannesburg	15,259.8	14,647.3	4.0	92,483.6	88,771.7	16,806.1	101,855.3	311	383	– 19.0	9
Bates Wells South Africa	Johannesburg	12,224.3	11,250.0	9.0	62,025.7	48,898.0	13,463.0	68,311.0	352	316	11.0	11
Communications Corp. Ltd.	Cape Town	8,576.5	7,330.9	17.0	51,973.9	44,425.2	9,445.6	57,240.6	309	272	14.0	8
Lindsay Smithers-FCB Holdings	Sandton	8,189.2	7,055.1	6.0	54,622.0	47,057.0	9,019.0	60,157.0	270	270	0.0	7
VZ, Ogilvy & Mather Group	Sandton	7,170.4	4,805.1	49.0	44,831.1	30,577.3	7,897.0	49,374.0	193	165	17.0	1
Lintas Ltd.	Johannesburg	5,725.7	4,807.5	19.0	35,705.5	29,879.1	6,305.9	39,323.7	140	145	– 3.0	2
J. Walter Thompson Co.	Johannesburg	5,349.0	4,838.2	11.0	32,653.8	28,757.7	5,891.0	35,962.7	151	164	– 8.0	2
G. de Villiers & Co.	Johannesburg	4,861.0	3,779.0	29.0	28,833.0	23,418.0	5,353.0	31,755.0	148	134	10.0	3
McCann-Erickson (South Africa)	Johannesburg	4,342.0	4,728.0	– 8.0	28,961.0	31,536.0	4,782.0	31,896.0	71	137	– 48.0	N/A
KMP-Compton Ltd.	Johannesburg	4,251.5	3,677.8	16.0	26,268.1	22,814.1	4,682.3	28,929.9	142	149	– 5.0	4
D'Arcy MacManus Masius	Johannesburg	4,095.7	3,624.4	13.0	27,318.2	24,174.7	4,510.7	30,086.4	110	115	– 4.0	3
Barker, McCormac	Johannesburg	3,389.7	2,904.3	17.0	20,119.8	16,536.2	3,733.2	22,158.6	103	109	– 6.0	4
Campbell-Ewald Ltd.	Johannesburg	1,748.0	1,297.0	35.0	11,659.0	8,651.0	1,925.0	12,840.0	52	36	44.0	N/A
Key Advertising Ltd.	Johannesburg	856.7	1,003.3	– 15.0	4,760.9	5,990.0	943.5	5,243.3	24	31	– 22.0	1
P.N. Barrett Co.	Cape Town	753.2	602.2	25.0	4,786.8	3,835.1	892.5	5,183.8	26	31	– 16.0	N/A
SOUTH KOREA											**Exchange rate: 0.0013 won**	
Korea First Advertising	Seoul	10,472.1	7,864.0	33.0	64,427.9	43,064.6	W8.06 bill.	W49.56 bill.	261	205	27.0	N/A
Oricom Inc.	Seoul	9,164.1	7,599.1	21.0	52,030.8	36,140.7	7.05 bill.	40.02 bill.	286	223	28.0	2
Hee Sung Co.	Seoul	3,554.2	2,554.5	39.0	34,498.1	24,351.6	2.73 bill.	26.54 bill.	131	94	39.0	1
Union Advertising	Seoul	3,380.0	3,055.0	11.0	37,700.0	30,550.0	2.60 bill.	29.00 bill.	131	125	5.0	1
Nara Advertising	Seoul	795.0	795.9	– 0.1	8,167.0	6,667.0	611,500.0	6.45 bill.	40	32	25.0	1
SPAIN											**Exchange rate: 0.0073 peseta**	
J. Walter Thompson S.A.	Madrid	6,377.6	5,298.7	20.0	42,538.5	35,342.3	Ptas873,642.0	Ptas 5.83 bill.	128	124	3.0	2
McCann-Erickson S.A.	Madrid	4,802.0	3,542.0	36.0	32,029.0	23,625.0	657,750.0	4.39 bill.	97	90	8.0	2
Tiempo/BBDO S.A.	Barcelona	4,735.5	4,229.6	12.0	41,895.4	31,232.0	648,700.0	5.74 bill.	79	76	4.0	2
Lintas S.A.	Madrid	4,624.0	3,447.0	34.0	31,935.0	24,582.0	633,450.0	4.37 bill.	88	81	9.0	3
Cid S.A. Publicidad	Barcelona	4,119.7	3,852.9	7.0	28,353.2	32,348.4	564,345.0	3.88 bill.	110	109	0.1	5
Clarin Publicidad	Madrid	4,091.6	N/A	N/A	25,857.9	N/A	560,488.6	3.54 bill.	N/A	N/A	N/A	3
Delvico/DFS	Madrid	4,065.7	3,589.0	13.0	27,118.2	24,845.8	556,945.0	3.71 bill.	95	95	0.0	3
Unitros S.A.	Madrid/Barcelona	3,664.6	2,913.0	26.0	28,068.5	25,360.0	502,000.0	3.85 bill.	93	87	7.0	3
Tandem/DDB & Tandem/DDB Campmany-Guasch	Madrid	3,547.8	2,387.1	49.0	23,630.0	15,936.0	486,000.0	3.24 bill.	83	73	14.0	2

DPZ - BRAZIL'S MOST AWARD-WINNING AGENCY PRESENTS SOME OF ITS INTERNATIONAL TROPHIES:

DPZ-Duailibi, Petit, Zaragoza Propaganda S.A.
Av. Cidade Jardim, 280 - Tel. (011) 280-5433 - CEP 01454 - São Paulo - SP
Rua Visconde de Pirajá, 351 - 14.º andar - Tel. (021) 267-3082 - CEP 22410 - Rio de Janeiro - RJ
Rua Saldanha Marinho, 30 - Tel. (0512) 33-7881 - CEP 90000 - Porto Alegre - RS
Edifício Presidente - SCS - Quadra 6 - Bloco A, n.º 141 - Sala 106 - Tel. (061) 225-4016 - CEP 70300 - Brasília - DF

Notes to individual agency listings

(Continued from Page 75)

Feldman Calleux Associes figures include FCA Lyon, FCA Mediterranee, LK and Marketware. Employee figures exclude Gestion et Recherche Publicitaire and Utile personnel.
Fusion part of EUROCOM/Havas Conseil.
Futurs Groupe part of EUROCOM/Univas
INF.14 part of Belier Groupe/EUROCOM/Univas.
Novation part of EUROCOM/Havas Conseil.
Optima part of EUROCOM/Havas Conseil.
Public-Est part of EUROCOM/Havas Conseil.
Publicis Conseil includes figures for B.C.A., De Bonneville Orlandini, CLV, Edico, Mundoprint, Orexa, Oscar, Projectis, Siquier Courcelle, Success and Media System.
Roux Seguela Cayzac & Goudard also has offices in Belgium, Netherlands, Germany, Switzerland, Italy, Spain, U.K., the Caribbean, Lebanon and the Ivory Coast.
Strategie part of Belier Groupe/-EUROCOM/Univas.
Taurus part of Belier Groupe/EUROCOM/Univas.
Unicom part of EUROCOM/Havas Conseil.
Uniconseil part of EUROCOM/Havas Conseil.
Young & Rubicam France totals include Wunderman, Ricotta & Kline, Cato Johnson, Sudler & Hennessey, Marsteller, Burson-Marsteller, Horizons Media, SNIP 4 and SNIP 4 Nord, ALS Conseil, MCI Consultants, TONIC and PROGEP. Y&R does not report billings. Figures are AA estimates.

GERMANY

D'Arcy MacManus Masius branch office in Hamburg.
Die Werbe Euro-Advertising is part of JWT Group.
Doyle Dane Bernbach includes figures for DDB, Munich.
GGK Duesseldorf Werbeagentur includes figures for offices in Frankfurt and Hamburg.
Heye, Needham & Partners includes figures for Heye, Needham, Duesseldorf and part ownership of Dr. Kosdorff & Partner, Vienna.
Hildmann Simon Rempen & Schmitz/SMS is part of the Scali, McCabe, Sloves group, which itself is owned by Ogilvy & Mather.
Ogilvy & Mather Group includes figures for Heumann, Ogilvy & Mather; Ogilvy & Mather Direkt, Frankfurt and Hamburg, and Ogilvy & Mather Focus.
Team/BBDO Group includes figures for IMPARC, Eiler & Riemel, Team/BBDO, Hamburg and Team Direct.
von Mannstein Gruppe includes von Mannstein advertising, medical innovation and political communication. Offices also in Duesseldorf and Munich.
William Wilkens Werbeagentur in 1983 bought back the shares held by the EUROCOM/Univas network.
Wirz & Hafner Werbeberatung part of Wirz Holding, Zurich.
Young & Rubicam GmbH includes Cato Johnson, Y&R Munich and Sudler & Hennessey. Y&R does not report billings. Figures are AA estimates. Y&R GmbH reports consolidated gross income for Y&R, Wunderman, Ricotta & Kline, Cato Johnson, Sudler & Hennessey, Marsteller and Burson-Marsteller.

GREECE

Euro-Advertising part of JWT Group.
Lamda Alpha Advertising branch offices in Thessaloniki and Limassol (Cyprus).

GUATEMALA

APCU Thompson Asociados, Guatemala City, part of the JWT Group, and head office of the APCU Group which has offices in six countries of Central America.
Publicidad Siboney's Guatemala office also covers El Salvador and Honduras. Siboney is part of NCK Intl, which merged with Foote, Cone & Belding Intl. Jan. 1984.
Publimerca S.A. associated with N W Ayer Intl.

HONG KONG

Dailey & Associates (HK) Part of Interpublic Group of Cos. Gross income for 1983 and 1982 are AA estimates.
Meridian Advertising (HK) part of Ogilvy & Mather Intl.
Results (Hong Kong) part of Ogilvy & Mather Intl.
Synergie Communications, founded June, 1983, is part of Kenyon & Eckhardt Intl. Gross income is estimated by AA.
Young & Rubicam (HK) does not report billings. Figures given are AA estimates. Y&R (HK) reports consolidated gross income for Y&R (HK), Cato Johnson and Burson-Marsteller.

INDIA

Advertising & Sales Promotion Co. part of N W Ayer network.

INDONESIA

Meridian Advertising part of Ogilvy & Mather Intl.
P.T. Bates Kencana Indah was founded in 1983.
P.T. Perwanal Dimamika Mulya Mandiri part of D'Arcy MacManus Masius.

IRELAND

Brian Cronin & Associates gross income for 1983 and 1982 estimated by AA.
McConnells Advertising Service gross income for 1983 and 1982 estimated by AA.

ISRAEL

Ariely Advertising gross income for 1983 and 1982 AA estimates.
Aylon Advertising gross income for 1983 and 1982 AA estimates.
May-Tal Associated Advertising Services gross income for 1983 and 1982 AA estimates.
Ovnat, Karmon, Shifrin & Naaman gross income for 1983 and 1982 AA estimate.
Wimmer, Jacobsohn, Tamir Advertising gross income for 1983 and 1982 AA estimates.

ITALY

B Communications part of DFS Intl.
Consumer Benefit Communication CPC part of D'Arcy MacManus Masius Intl.
MAC S.p.A. figures are consolidation of Milan and Genoa offices.
P&T Pubblicita e Marketing part of Needham, Harper & Steers Intl.
Pubbli Dan Wirz part of Wirz Holding AG, Switzerland.
Young & Rubicam Italia does not report its billings. Figures are AA estimates. Y&R Italia reports gross in-

(Continued on Page 80)

How much does a peak-time spot cost on Danish TV? Nothing – there is no commercial TV in Denmark.
The Irish socio-economic scale: A, B, C, D, E, and F. (F? Farmers, of course.)
If you want to talk to Austrian women, should you advertise in Austria? No, they read German magazines.
Cigarette advertising on Spanish TV will Costa Packet.
Are you accustomed to the traditional British pastime of pre-empting? If not, it could cost you a TV spot.
Some advertisers adopt a coo! approach to Italian no-cigarette laws, and build the fine into their budgets beforehand.
WOULD YOU SURVIVE ON YOUR OWN IN EUROPE?
How many commercial radio stations has Belgium got. Six? Sixteen? Sixty? Six hundred and fifty? (0S9)
The good news: no shortage of advertising space in Portuguese newspapers. The bad news: only 3% of the population read them.
Port
How short is the supply of airtime in the Netherlands? (Hint: a heavy campaign could be as much as one spot a week.)
Sprechen Sie Deutsch? Parlez-vous Français? Parli Italiano? Your voice-over will have to, for Swiss national TV.
Be sure to allow for little extras in your Greek media budget. Taxes can add up to 60%.
The Germans have a great system for avoiding last minute panic. Everyone has to book TV airtime twelve months in advance.
What does French TV say to margarine, computers, books, and airlines? Non, non, non, non.
Did you know you can advertise on State television in Finland?
If some of these facts came as a surprise, you'd better get the Focus European Media and Marketing Guide. We went to D'Arcy-MacManus Masius's nineteen European offices to compile up-to-date information for the 92-page Guide. How far would you get without it?
NAME
ADDRESS
POSTCODE
To receive a copy of the Focus European Media and Marketing Guide please send £10 to Crain Communication Ltd, 20-22 Bedford Row, London WC1R 4EB (for Europe).
Outside Europe – US $15 to Heidi Schultz, Circulation Manager, Advertising Age's Focus, 740 Rush St., Chicago 11160611 USA.
FOCUS
DM-M

Carvis Needham/Spain
Madrid, Spain

Hanser, Larsson & Roestlund/BBDO
Stockholm, Sweden

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983	Billings 1983	Employes 1983	1982	Per cent change	offices
							FOREIGN CURRENCY					
Danis Benton & Bowles	Madrid	3,212.0	2,956.5	9.0	24,608.3	22,024.1	440,000.0	3.37 bill.	91	94	– 3.0	3
Bassat, Ogilvy & Mather	Barcelona	3,146.2	2,079.1	51.0	20,985.1	13,879.2	430,986.0	2.87 bill.	82	58	41.0	2
NCK/Spain	Madrid	3,000.0	3,800.4	– 21.0	20,000.0	25,331.0	410,958.0	2.74 bill.	N/A	N/A	N/A	N/A
Young & Rubicam Espana	Madrid	2,811.0	2,617.0	7.0	18,749.0	17,455.0	385,107.0	2.57 bill.	75	77	– 3.0	2
Distribuidora Cid de Publicidad	Madrid	2,428.7	2,100.8	16.0	121,910.0	96,360.0	332,697.0	16.70 bill.	71	65	9.0	2
Leo Burnett S.A.	Madrid	2,284.0	1,742.0	31.0	15,233.0	11,620.0	312,842.0	2.09 bill.	53	52	2.0	1
Interalas D'Arcy MacManus Masius	Madrid	2,255.8	2,892.2	22.0	12,394.6	19,470.7	309,013.0	1.70 bill.	72	72	0.0	4
Los Tiroleses S.A.	Madrid	1,910.4	1,432.3	34.0	16,809.0	13,592.0	216,700.0	2.30 bill.	28	32	– 13.0	1
FCB Madrid	Madrid	1,680.0	1,640.3	2.0	11,205.9	10,940.5	230,143.0	1.50 bill.	43	60	– 28.0	2
GDD Ayer S.A.	Barcelona	1,646.3	1,485.7	11.0	10,981.0	9,912.2	225,523.3	1.50 bill.	30	30	0.0	2
BCK S.A.	Barcelona	1,510.0	1,340.0	13.0	10,100.0	9,000.0	206,848.9	1.38 bill.	22	21	5.0	N/A
Saatchi & Saatchi Compton S.A.	Madrid	1,346.9	789.6	98.0	8,979.0	5,264.3	184,500.0	1.20 bill.	38	21	81.0	2
Ted Bates Espana S.A.	Madrid	1,342.5	1,027.1	31.0	9,170.0	6,600.0	183,900.0	1.26 bill.	45	42	7.0	1
TAPSA	Madrid	1,306.8	872.4	50.0	8,745.4	5,905.7	179,010.0	1.20 bill.	34	27	29.0	1
TBWA Spain	Madrid	1,073.0	843.0	27.0	7,154.0	5,625.0	147,000.0	980,000.0	27	30	– 10.0	1
Grey Espana	Madrid	1,011.1	652.6	55.0	6,745.2	4,350.8	138,500.0	924,000.0	22	20	10.0	1
Carvis Needham (Spain)	Madrid	878.3	794.0	11.0	6,266.0	5,882.0	120,312.0	858,351.0	31	25	24.0	2
Intermarco/MMLB Internacional S.A.	Madrid	796.0	534.0	49.0	5,110.0	3,781.0	109,000.0	700,000.0	21	14	50.0	2
Ogilvy & Mather Direct S.A.	Barcelona	479.6	324.6	48.0	3,199.2	2,164.9	65,703.9	438,244.8	11	9	22.0	2
GGK Madrid	Madrid	149.7	N/A	N/A	998.0	N/A	20,500.0	136,700.0	6	N/A	N/A	1
SRI LANKA											**Exchange rate: 0.045 rupee**	
HTA Thompson Lanka Ltd.	Colombo	202.5	155.3	30.0	1,350.1	1,035.1	SLr4,500.0	SLr30,001.5	38	33	15.0	1
SWEDEN											**Exchange rate: 0.1322 kroner**	
AB Ervaco	Stockholm	7,891.0	5,434.7	45.0	52,633.0	36,249.2	SKr59,689.9	SKr398,131.8	140	160	– 13.0	N/A
Ted Bates AB	Stockholm	6,399.0	5,559.0	15.0	19,740.0	18,542.0	48,406.0	149,321.0	146	137	7.0	3
Grey Svenska	Stockholm	5,399.7	4,391.3	23.0	38,084.7	31,202.5	40,845.0	288,083.4	120	110	9.0	7
Annonsbyran Svea	Stockholm	5,141.4	4,770.0	8.0	50,917.5	44,462.8	38,891.0	385,155.0	160	161	– 0.6	1
Young & Rubicam AB	Stockholm	3,877.0	2,943.0	32.0	25,860.0	19,630.0	29,310.0	195,600.0	82	71	16.0	4
Hanser, Larsson & Roestlund/BBDO	Stockholm	2,907.9	2,265.2	28.0	22,293.7	17,366.9	21,996.0	168,636.0	46	45	2.0	1
Ogilvy & Mather Group	Stockholm	2,896.0	2,325.0	25.0	18,906.0	16,346.0	21,901.0	143,010.0	70	68	3.0	6
Hans Brindfors Annonsbyro	Stockholm	2,682.0	2,104.4	28.0	17,726.0	9,467.1	20,286.0	134,084.0	45	34	32.0	1
Intermarco-Farner AB	Stockholm	2,618.0	2,163.0	21.0	25,400.0	14,429.0	19,806.0	192,106.0	53	48	10.0	3
Inter-Media Sweden	Vasteras	2,328.0	N/A	N/A	75,109.0	N/A	17,609.0	568,124.5	N/A	N/A	N/A	1
Annonsbyran Landia AB	Stockholm	2,102.0	1,470.0	43.0	16,331.0	11,671.0	15,901.0	123,542.0	44	45	– 2.0	2
AB Lintas Annonsbyra	Stockholm	1,892.0	2,239.0	– 16.0	14,782.0	18,294.0	14,395.0	111,852.0	47	49	– 4.0	2
Hall & Cederquist Annonsbyra	Stockholm	1,811.1	1,394.7	30.0	7,363.5	5,924.6	13,700.0	55,700.0	29	28	4.0	2
Blomquistbyraerna AB	Stockholm	1,586.0	1,586.0	N/A	12,325.0	11,664.0	12,000.0	93,227.0	43	47	– 9.0	1
D'Arcy MacManus Masius	Stockholm	1,520.0	1,360.0	12.0	15,365.0	13,255.0	11,495.0	116,223.0	40	40	0.0	1
McCann-Erickson AB	Stockholm	1,431.0	1,235.0	16.0	9,545.0	8,237.0	10,821.0	72,176.0	43	39	10.0	N/A
Falk & Pihl/Doyle Dane Bernbach	Stockholm	1,352.0	1,293.0	5.0	9,018.0	8,626.0	10,228.0	68,220.0	19	20	– 5.0	1
J. Walter Thompson Co. AB	Stockholm	1,254.0	1,154.0	9.0	8,774.0	7,184.0	9,486.0	66,373.0	24	24	0.0	1
Perceptum Information AB	Stockholm	1,251.0	692.4	81.0	11,173.1	3,911.9	9,463.0	84,516.4	22	20	10.0	2
NCK/Sweden	Stockholm	1,050.0	1,468.0	– 28.0	7,000.0	9,786.5	7,942.2	52,948.0	N/A	N/A	N/A	N/A
AB Toernbloms Annonsbyra	Stockholm	991.5	1,189.8	– 17.0	7,604.8	9,125.8	7,500.0	57,525.0	22	36	– 39.0	1
Nedeby Ayer AB	Stockholm	846.1	674.2	26.0	7,008.8	5,459.1	6,400.0	53,017.0	21	15	40.0	1
FCB Communications	Stockholm	801.0	900.0	– 11.0	5,345.0	6,000.0	6,062.0	40,434.0	19	16	19.0	1
Marsteller Scandinavia	Stockholm	498.0	325.0	53.0	3,322.0	2,168.0	3,767.0	25,129.0	12	11	9.0	N/A
DFS Pihlstroem	Stockholm	375.8	577.0	– 35.0	2,010.8	4,157.0	2,843.0	15,210.0	7	11	– 36.0	1
AB Olof Isaacsons Annonsbyra	Gothenburg	311.1	329.5	– 6.0	2,073.8	2,196.8	2,353.2	15,687.0	16	20	– 20.0	1
SWITZERLAND											**Exchange rate: 0.4796 franc**	
Young & Rubicam	Berne	5,138.0	7,054.0	– 27.0	34,270.0	47,050.0	SF10,738.0	SF71,455.4	87	72	21.0	5

1984 EDITION

FOREIGN AGENCY INCOME

SWITZERLAND-VENEZUELA

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983 FOREIGN CURRENCY	Billings 1983 FOREIGN CURRENCY	Employes 1983	1982	Per cent change	offices
Adolf Wirz Inc.	Zurich	4,540.0	4,772.0	– 5.0	30,290.0	31,836.0	9,470.0	63,150.0	61	61	0.0	4
Advico AG	Zurich	4,388.3	3,961.5	11.0	29,270.0	26,426.0	9,150.0	61,030.0	63	63	0.0	1
GGK Basel Werbeagentur	Basel/Zurich	4,173.0	4,101.0	2.0	27,817.0	27,337.0	8,700.0	58,000.0	61	62	– 2.0	2
Dr. Rudolf Farner Werbeagentur	Zurich	4,033.0	3,899.0	3.0	26,906.0	25,944.0	8,410.0	56,100.0	68	68	0.0	1
Gisler & Gisler/BBDO	Zurich	3,838.2	4,061.3	– 5.0	25,601.0	27,088.8	8,003.0	53,380.0	69	77	– 10.0	2
Doyle Dane Bernbach AG	Zurich	3,453.0	3,345.0	3.0	23,032.0	22,313.0	7,200.0	48,024.0	48	54	11.0	1
McCann-Erickson S.A.	Geneva/Zurich	3,441.0	2,930.0	17.0	22,951.0	19,543.0	7,174.0	47,851.0	60	54	11.0	N/A
Marsteller Intl.	Geneva	2,933.0	2,457.0	19.0	19,600.0	16,400.0	6,117.0	40,798.0	45	0	13.0	1
C.S.W.H. Univas	Zurich/Bienne	2,411.0	2,273.0	6.0	16,083.0	15,155.0	5,027.0	33,540.0	57	50	14.0	3
SSC&B:Lintas/Lintas:Zurich	Zurich	2,404.5	2,526.3	– 5.0	16,037.8	16,850.6	5,013.5	33,440.0	41	42	– 2.0	1
Seiler Zurich Werbeagentur	Zollikerberg	2,226.8	2,071.9	7.0	14,852.7	13,812.5	4,643.0	30,969.0	N/A	35	N/A	1
Zutter Sommer Marketing	Basel	2,163.0	2,022.0	7.0	14,404.8	13,484.0	4,510.0	30,035.0	24	25	– 4.0	1
Dieter Jaeggi AG	Bern/Zurich	2,038.3	1,841.7	11.0	13,572.7	12,277.8	4,250.0	28,300.0	N/A	36	– N/A	N/A
Schellenberg, Ogilvy & Mather	Zurich	2,005.0	1,998.0	– 0.4	13,369.0	13,327.0	4,181.0	27,875.0	30	31	– 3.0	1
Kloeti Advertising	Zurich	1,998.5	1,703.0	17.0	15,331.4	11,109.5	4,167.0	31,967.0	31	27	15.0	1
J. Walter Thompson AG	Zurich	1,965.0	1,804.0	9.0	13,108.0	12,028.0	4,098.0	27,333.0	29	29	0.0	1
Barlogis und Jaeggi	Zurich	1,697.8	1,654.6	3.0	13,332.9	12,613.5	3,540.0	27,800.0	N/A	17	– N/A	1
Unicom	Geneva	1,678.6	1,654.6	2.0	11,175.0	11,078.8	3,500.0	23,300.0	39	41	– 5.0	2
Marsden, Hartman/NCK	Zurich	1,650.0	2,109.2	– 22.0	11,000.0	14,061.4	3,440.3	22,935.0	N/A	N/A	N/A	N/A
TBWA Switzerland	Zurich	1,523.0	1,648.0	– 8.0	10,158.0	10,995.0	3,175.0	21,180.0	23	28	– 18.0	1
BEP S.A.	Lausanne	1,446.0	1,501.0	– 4.0	9,645.0	10,055.0	3,015.0	20,110.0	24	23	4.0	1
D'Arcy MacManus Masius	Zurich	1,388.4	1,273.0	9.0	9,256.3	8,448.9	2,895.0	19,300.0	20	20	0.0	1
Kenyon & Eckhardt S.A.	Geneva	1,000.0	720.0	39.0	6,750.0	4,800.0	2,100.0	14,100.0	11	10	1.0	N/A
Creative Collaboration-Grey	Geneva	900.2	857.1	5.0	6,004.4	5,716.6	1,877.0	12,519.6	12	16	– 25.0	1.0
Quadri & Partner AG	Zurich	571.7	N/A	N/A	3,812.8	N/A	1,192.0	7,950.0	10	8	25.0	1
Agence Pubaco	Bienne	480.0	383.0	25.0	2,638.0	2,446.0	1,000.0	5,500.0	13	13	0.0	1
Fedier's Werbeagentur	Zurich	359.7	335.7	7.0	1,810.5	1,649.3	750.0	3,775.0	6	6	0.0	1
Leo Burnett Co.	Geneva	280.0	N/A	N/A	1,868.0	N/A	584.0	3,895.0	5	N/A	N/A	1
Rogivue Consulting	Zurich	90.0	58.6	54.0	600.0	378.0	187.4	1,250.0	2	2	0.0	1
TAIWAN											**Exchange rate: 0.025 T dollar**	
United Advertising	Taipei	2,238.0	2,051.3	9.0	14,920.0	13,675.0	NT$91,380.0	NT$597,000.0	155	140	11.0	1
Eastern Advertising	Taipei	1,033.6	920.3	12.0	6,800.0	6,015.0	41,344.0	272,000.0	83	80	4.0	2
United Communications	Taipei	875.0	685.0	28.0	5,897.0	4,308.2	35,000.0	235,880.0	38	33	15.0	1
Cambridge Advertising	Taipei	856.3	743.8	15.0	4,575.5	3,891.7	34,253.8	183,018.8	42	34	24.0	N/A
Needham Standard Intl. (Taiwan)	Taipei	45.0	N/A	N/A	300.0	N/A	1,799.0	12,000.0	6	N/A	N/A	1
THAILAND											**Exchange rate: 0.0435 baht**	
SSC&B:Lintas Thailand	Bangkok	3,558.0	2,875.0	24.0	24,230.0	20,114.0	Bht81,791.0	Bht557,005.0	138	126	10.0	3
Ogilvy & Mather (Thailand)	Bangkok	2,395.0	1,854.7	29.0	14,890.5	11,380.9	55,057.1	342,311.1	120	113	4.0	1
Ted Bates	Bangkok	1,600.0	1,400.0	14.0	10,800.0	9,600.0	37,000.0	250,000.0	103	98	5.0	1
McCann-Erickson (Thailand)	Bangkok	1,491.0	1,306.0	14.0	9,945.0	8,711.0	34,273.0	228,601.0	80	79	1.0	N/A
Leo Burnett Ltd.	Bangkok	1,388.0	1,189.0	17.0	9,256.0	7,933.0	31,900.0	212,773.0	N/A	N/A	N/A	1
Chuo Senko (Thailand)	Bangkok	1,100.0	1,048.0	5.0	7,700.0	7,168.0	25,300.0	177,485.0	43	39	10.0	1
Far East Advertising	Bangkok	928.0	710.0	31.0	8,557.0	6,100.0	21,350.0	196,700.0	133	113	18.0	1
Kenyon & Eckhardt	Bangkok	696.0	566.0	23.0	4,029.0	3,416.0	16,000.0	92,614.0	52	48	8.0	1
Prakit & Associates	Bangkok	653.0	566.0	15.0	5,220.0	4,350.0	15,000.0	120,000.0	65	56	16.0	1
Amex & Grey Advertising	Bangkok	570.0	439.7	30.0	3,801.9	2,932.7	13,118.0	87,497.0	52	48	8.0	1
Meridian Advertising	Bangkok	499.1	416.1	20.0	3,169.7	2,698.5	11,473.3	72,867.7	23	21	10.0	1
Thai Image Advertising	Bangkok	383.0	282.0	36.0	2,859.0	2,384.0	8,807.0	65,755.0	43	40	8.0	1
Redford International	Bangkok	281.8	223.4	26.0	1,409.1	1,115.5	6,478.8	32,394.2	27	25	8.0	1
Paterson & Partners Thailand	Bangkok	269.0	425.0	– 37.0	1,867.0	2,835.0	6,191.0	42,918.0	33	N/A	N/A	1
Mayford Ltd.	Bangkok	159.9	170.7	– 6.0	1,057.7	1,059.4	3,674.8	24,315.9	26	26	0.0	1
J. Walter Thompson Co.	Bangkok	129.5	N/A	N/A	437.8	N/A	2,976.5	10,063.3	18	N/A	N/A	1
TRINIDAD											**Exchange rate: 0.414 T dollar**	
McCann-Erickson (Trinidad)	Port of Spain	2,343.0	1,723.0	36.0	15,628.0	11,492.0	T$5,658.0	T$37,739.0	75	71	6.0	N/A
NCK/Trinidad	Port of Spain	700.0	900.0	– 22.0	4,680.0	6,000.0	1,691.0	11,304.0	N/A	N/A	N/A	1
Kenyon & Eckhardt Caribbean Advertising	Port of Spain	568.6	488.9	16.0	3,792.7	3,288.9	1,373.5	9,161.1	29	27	7.0	1
Beston/Benton & Bowles	Port of Spain	370.1	336.5	10.0	1,593.9	1,449.0	894.0	3,850.0	15	15	0.0	1
Corbin Compton Ltd.	Port of Spain	309.6	283.3	9.0	2,225.1	1,836.8	747.8	5,374.7	19	18	6.0	5
TURKEY											**Exchange rate: 0.00483 lira**	
Pars/McCann	Istanbul	1,180.9	749.4	58.0	7,157.1	4,942.1	TL244,500.0	TL1.48 bill.	54	49	10.0	N/A
Reklam Moran	Istanbul	915.0	685.0	34.0	6,692.0	4,820.3	189,500.0	1.39 bill.	49	49	0.0	1
Rota Advertising	Istanbul	716.2	642.4	12.0	5,794.2	4,549.3	148,272.0	1.12 bill.	38	29	31.0	3
Fulmar Reklam Sanayii	Istanbul	217.4	154.3	41.0	1,449.0	1,028.8	45,000.0	300,000.0	20	20	0.0	1
URUGUAY											**Exchange rate: 0.0362 peso**	
Impetu Organizacion Publicitaria	Montevideo	687.8	N/A	N/A	4,587.9	N/A	Ps19,001.2	Ps126,738.3	37	N/A	N/A	1
Corporacion Publicitaria	Montevideo	633.5	452.5	40.0	2,787.4	1,391.0	17,500.0	77,000.0	30	27	11.0	1
Grey, Casares, Vernazza & Asociados	Montevideo	356.1	221.8	61.0	2,375.1	1,479.4	9,836.6	65,610.1	18	19	– 5.0	1
Publicidad Oriental	Montevideo	345.3	338.5	2.0	1,518.6	1,496.9	9,540.0	41,950.0	20	22	– 9.0	N/A
McCann-Erickson (Uruguay)	Montevideo	272.0	207.0	31.0	1,814.0	1,381.0	7,516.0	50,132.0	14	13	8.0	N/A
J. Walter Thompson Uruguaya	Montevideo	131.0	138.3	– 5.0	872.3	920.9	3,620.0	24,096.0	12	12	0.0	1
VENEZUELA											**Exchange rate: 0.1403 bolivar**	
J. Walter Thompson de Venezuela	Caracas	6,753.7	5,774.4	17.0	47,766.8	42,728.0	Bs48,137.8	Bs340,462.0	111	116	– 4.0	1

Agency	City	Gross income ($000) 1983	1982	Per cent change	Billings ($000) 1983	1982	Gross income 1983 FOREIGN CURRENCY	Billings 1983 FOREIGN CURRENCY	Employes 1983	1982	Per cent change	offices
Corporacion Publicitaria Nacional CORPA	Caracas	6,387.6	5,331.5	20.0	42,605.1	34,806.1	45,527.9	303,674.4	142	134	6.0	5
Leo Burnett Venezuela	Caracas	2,178.0	2,605.0	– 16.0	14,529.0	17,378.0	15,526.0	103,558.0	60	74	– 19.0	1
Publicidad Siboney	Caracas	1,526.1	1,946.8	– 22.0	10,174.0	12,978.6	10,878.0	72,516.2	N/A	N/A	N/A	1
JMC Creatividad Orientada	Caracas	1,411.5	1,239.8	14.0	9,410.0	8,277.1	10,060.6	67,070.7	36	36	0.0	2
Grey Advertising de Venezuela	Caracas	923.2	1,413.6	– 35.0	6,157.6	9,429.0	6,580.0	43,888.6	38	54	– 30.0	1
Blanco Uribe/FCB Publicidade	Caracas	862.7	803.4	7.0	5,754.2	5,358.8	6,149.0	41,013.8	32	32	0.0	1
AW/Compton	Caracas	785.7	589.3	33.0	4,707.0	3,569.3	5,600.0	33,550.0	22	19	16.0	1
YUGOSLAVIA								**Exchange rate: 0.011 dinar**				
Ozeha Marketing & Advertising	Zagreb	983.8	732.2	34.0	4,260.1	3,394.0	D89,370.0	D387,000.0	129	131	– 2	6
ZAMBIA								**Exchange rate: 0.825 kwacha**				
McCann-Erickson (Zambia)	Lusaka	433.0	390.0	11.0	2,888.0	2,601.0	Zk525.0	Zk3,502.0	17	16	6.0	N/A
Fleetfoot Advertising	Lusaka	312.4	320.8	– 3.0	953.5	1,038.3	378.7	1,155.7	23	26	– 12.0	1
ZIMBABWE								**Exchange rate: 0.980 Z dollar**				
Michael Hogg D'Arcy MacManus Masius	Harare	1,076.0	850.6	27.0	6,708.0	5,337.1	Z$1,098.0	Z$6,845.0	64	59	9.0	1
SSC&B:Lintas (Zimbabwe)	Harare	787.3	726.3	8.0	3,092.8	3,149.4	803.3	3,155.9	36	42	– 14.0	1

Notes to individual agency listings

(Continued from Page 77)
come for Y&R, Cato Johnson and Burson-Marsteller.

JAMAICA

CGR Communications gross income estimated by AA.

JAPAN

Asia Advertising Agency 1983 gross income and billings figures projected for fiscal year ending April, 1983.
Asatsu BBDO Intl. purchased earlier this year a 10% equity in Asatsu and the Japanese agency acquired a 2% share of BBDO Intl.
Dai-Ichi Kikaku figures are a consolidation of its percentage ownership in 18 agencies.
Dentsu-Young & Rubicam KK does not report billings. Figures are AA estimates. Totals include consolidated gross income figures for Sudler & Hennessey.
FCB (Japan) office opened late in 1983.
Meitsu Advertising part of Kenyon & Eckhardt Intl.
Standard Advertising affiliated with Needham, Harper & Steers Intl.
Tokyo Senko-Dailey/Tokyo Senko Intl. part of Interpublic Group of Cos.
Tokyu Agency International came to a joint venture agreement with Ogilvy & Mather Intl. Sept., 1983 in which O&M holds 49% equity.

LEBANON

Enterprise Middle East was founded as part of the JWT Group in 1983. Its "local currency" is U.S. dollars.
FCB Middle East local currency figures are AA estimates. The agency is headquartered in Athens but does business in the Middle East.
Intermarkets S.A.L. local currency is not given because returns from eight Middle East offices—Bahrain, Kuwait, Dubai, Egypt, Jordan, Syria, Qatar and Oman—and London are dollar-consolidated at the corporate level.
Madco Lebanon established in 1972, was considered head office of the Madco Group. At present, the Beirut office only deals with local activities and temporary headquarters have been set up in Dubai.

MALAYSIA

Flagbearer Meridian Advertising part of Ogilvy & Mather Intl.
Ronald Quay is affiliated with N W Ayer Intl.
Wings Creative part of BBDO Intl.
Young & Rubicam Dentsu does not report billings. Figures are AA estimates. Y&R holds 50% equity.
Grant Advertising affiliated with Kenyon & Eckhardt Intl., did not report.

MEXICO

Iconic part of DFS Intl.
Maqueda Gibert/NCK Mexico now part of Foote, Cone & Belding Intl.
Noble y Asociados part of Benton & Bowles Intl
Garcia Putto y Asociados no gross income and billings figures available for 1982. Gross income for 1983 is AA estimate.
Young & Rubicam does not report billings. Figures are AA estimates. Y&R in Mexico reports consolidated gross income for Y&R and Cato Johnson.

NETHERLANDS

ARA Advertising & Marketing part of BBDO Intl.
Ogilvy & Mather (Nederland) figures include O&M Direct, O&M Rotterdam and GDR/O&M.
Paradies Advertising part of BBDO Intl.
PPGH/Moussault part of BBDO Intl.
Prins Meijer, Stamenkovits & van Walbeek, part of Y&R Inc., which holds 40% equity. Y&R does not report billings. Figures are AA estimates.
Prad B.V. part of the Alliance International Group.
RJA (Recia Janssens Advertising) part of Euro Advertising, which is part of JWT Group.
Saatchi & Saatchi Compton name changed from VDB/Compton.
Young & Rubicam-Koster Holdings does not report billings. Figures are AA estimates. Included in gross income are consolidated figures for Wunderman, Ricotta & Kline, Cato Johnson and Burson-Marsteller.

NORWAY

Bates Gruppen A/S figures include BAB Bates, Bates-Sor, Ekko-Bates, Ottesen-Bates, A.G. Heltberg, Bates-Vestfold and AB Bates.
J.T.K A/S part of N W Ayer Intl.
Scaneco-Young & Rubicam is 50% owned by Y&R.
Young & Rubicam A/S does not report billings. Figures are AA estimates.

NEW ZEALAND

Atelier Advertising part of BBDO Intl., began operations in the summer of 1983.
Colenso Communications part of BBDO Intl.
J. Inglis Wright associated with Needham, Harper & Steers Intl.
MDA Mackay King Advertising part of Kenyon & Eckhardt Intl.
Rialto Advertising part of BBDO Intl.
Wood & Mitchell part of J. Inglis Wright, which is associated with Needham, Harper & Steers Intl.

PAKISTAN

D.J. Keymer & Co. gross income is an AA estimate.
Prestige Advertising billings are an AA estimate.

PANAMA

Boyd, Barcenas (BB&M) affiliated with Kenyon & Eckhardt.
Campagnani, Aleman Publicidad part of Leo Burnett Co.
Publicidad Velmor associated with NCK Intl., which became part of Foote, Cone & Belding in Jan., 1984.

PARAGUAY

Publicitaria Nasta affiliated with Kenyon & Eckhardt Intl. did not report.

PERU

Publicidad Lowder & Comunicando affiliated with Kenyon & Eckhardt Intl. did not report.
Publicistas Asociados part of BBDO Intl. Agency's gross income estimated by AA.

PHILIPPINES

Minds/K&E did not report.
Philprom Inc. gross [illegible] estimated by AA.

PORTUGAL

Sistema, with two offices, is part of the Saatchi & Saatchi Compton Worldwide group.
Team gross income figures for 1983 and 1982 are AA estimates.

PUERTO RICO

BBDO Puerto Rico gross income estimated by AA.
CPV Advertising part of Kenyon & Eckhardt Intl. did not report.
J.R. Marquina & Associates part of DFS Intl.
Marti, Flores, Prieto, Comunicaciones part of JWT Group.
Publicidad Siboney associated with NCK Intl., which became part of Foote, Cone & Belding in Jan., 1984.
Young & Rubicam Puerto Rico does not report billings. Figures are AA estimates. Y&R in Puerto Rico consolidates figures for Y&R and Burson-Marsteller.

SINGAPORE

Batey Ads part of BBDO Intl.
Quantum: FCB Advertising is a product of a merger in September, 1983. It has other units in Malaysia and Indonesia.
Young & Rubicam Pte. Ltd. does not report billings. Figures are AA estimates. Y&R in Singapore consolidates gross income for Y&R and Burson-Marsteller.

SOUTH AFRICA

Bates Wells & Associates Holdings include figures for Bates Wells Pty. Ltd., Bates Wells (Cape), Bates Wells Retail, Bates Wells AC&R, Bates Hickman & Associates, Medical Advertising, Cerca, Adgraphics, Adgraphics (Cape), Concept Communications, Concept Natal.
Communications Corp. (Pty.) Ltd. affiliated with Young & Rubicam.
G. de Villiers & Co. affiliated with Univas.
Grey Holdings Ltd. includes figures for Grey Action, Grey Advertising & Marketing, Grey Impact, Grey Mann, Grey Mills Kaye-Eddie, Grey Sandton, Grey Industrial and Grey Geddef.
Key Advertising (Pty.) Ltd. part of DFS Intl.

SOUTH KOREA

Nara Advertising associated with JWT Group.

SPAIN

Bassat, Ogilvy & Mather figures include Prieto, Bassat, Ogilvy & Mather in Madrid, but not Ogilvy & Mather Direct.
B.C.K. Barcelona is part of the Alliance International Group.
Distribuidora CID de Publicidad is a media buying shop, with another office in Barcelona.
GGK Madrid began operation in 1983.
Saatchi & Saatchi Compton name changed from Compton S.A.
TAPSA part of DFS Intl.
Young & Rubicam Espana does not report billings. Figures are AA estimates. Y&R Espana reports consolidated gross income for Y&R, Cato Johnson and Burson-Marsteller.

SRI LANKA

Grant Kenyon & Eckhardt (Lanka) and **Minds (Lanka)**, both part of Kenyon & Eckhardt Intl., did not report.

SWEDEN

Inter-Media Group, Vasteras headquarters; a media buying organization with offices in Norway and Denmark.
AB Olof Isacsons Annonsbyra gross income is estimated by AA.
Thor & Co. affiliated with Kenyon & Eckhardt Intl. did not report.
AB Tornbloms Annonsbyra part of Saatchi & Saatchi Compton Worldwide.
Perceptum Information AB affiliated with Needham, Harper & Steers Intl.
Young & Rubicam AB does not report billings. Figures are AA estimates. Y&R AB consolidates gross income for Y&R, Cato Johnson, Wunderman, Ricotta & Kline, Marsteller and Burson-Marsteller.

SWITZERLAND

BEP S.A. part of the Publicis Intermarco-Farner network.
Dr. Rudolf Farner Werbeagentur part of the Publicis Intermarco-Farner network.
GGK Basel includes figures for the agency's Zurich office.
Kloeti Werbeagentur affiliated with Saatchi & Saatchi Compton Worldwide.
Quadri & Partner AG, associated with Needham, Harper & Steers Intl.
Unicom part of EUROCOM/Univas. Edelta, Geneva, merged with Unicom in Jan., 1983.
Adolf Wirz Inc. offices in Vienna, Milan and Frankfurt.
Young & Rubicam AG does not report billings. Figures are AA estimates. Y&R AG gives consolidated gross income figures including Marsteller and Burson-Marsteller. The agency has offices in Berne, Zurich and Geneva.

TAIWAN

Needham Standard International opened in 1983.
United Advertising gross income for 1983 and 1982 are AA estimates.

THAILAND

Kenyon & Eckhardt Ltd. gross income for 1983 and 1982 are AA estimates.
Meridian Advertising part of Ogilvy & Mather Intl.
Paterson & Partners Thailand is affiliated with D'Arcy MacManus Masius.
Redford International part of Saatchi & Saatchi Compton Worldwide.
J. Walter Thompson Co. Ltd. opened Jan., 1983.

URUGUAY

Impetu Organizacion Publicitaria became the agency's new name January, 1983, as a result of a merger between Impetu Publicidad and Ferrero & Ricagni Publicitaria.

VENEZUELA

Corporacion Publicitaria Nacional (Corpa) part of Ogilvy & Mather Intl.
Publicidad Siboney associated with NCK Intl., which became part of Foote, Cone & Belding Jan., 1984.
JMC Creatividad Orientada part of Dancer Fitzgerald Sample.

ad linage

Advertising pages for U.S., Canadian, and foreign consumer publications—*April*

	Current month 1984	Current month 1983	Year-to-date 1984	Year-to-date 1983
— Art & antiques —				
American Artist	69.9	51.0	252.8	203.9
Antiques	153.4	128.2	609.4	552.5
Antique Monthly	37.0	34.6	133.0	122.6
Art in America (11X)	162.0	141.0	532.4	422.3
Plate World 6X	—	—	134.0	160.0
Southwest Art	72.8	75.2	302.7	342.8
Total Group	**500.1**	**430.0**	**1,964.3**	**1,804.1**
% change		**+16.3%**		**+8.8%**
— Auto/cycle/rec. vehicles —				
AutoWeek	149.0	114.3	453.5	463.2
Car & Driver	107.9	111.2	320.0	304.2
Car Collector & Car Classics	22.6	25.6	84.5	86.2
Car Craft	88.2	82.2	233.8	274.7
Cycle	74.7	106.9	218.0	303.4
Cycle Guide	71.0	65.2	184.4	199.8
Cycle World	88.3	80.3	239.3	247.3
Dune Buggies & Hot VWs	75.6	61.8	305.6	235.9
Family Motor Coaching	137.5	106.1	587.4	452.3
4 Wheel & Offroad	84.6	67.4	247.3	224.6
Four Wheeler	74.7	40.6	254.3	145.0
Hot Rod	72.4	73.6	192.0	216.7
Motorcyclist	59.0	55.1	157.0	183.5
Motor Trend	64.8	61.4	209.0	212.2
Motorhome	97.2	73.3	345.8	263.7
Pickup, Van & 4 WD	33.1	33.5	103.5	117.5
Road & Track	106.1	109.9	358.3	348.4
3 Wheeling	33.6	28.8	108.9	97.6
Trailer Life	142.0	112.8	494.4	398.5
Total Group	**1,582.3**	**1,410.0**	**5,097.0**	**4,774.7**
% change		**+12.2%**		**+6.7%**
— Boating & yachting —				
Boating	167.1	132.5	642.8	498.9
Chesapeake Bay	32.3	31.3	114.7	108.5
Cruising World	153.3	157.1	563.3	538.3
Lakeland Boating	69.3	54.6	233.6	200.0
Motor Boating & Sailing	174.6	154.2	732.3	633.2
Sail	158.4	127.3	596.5	479.2
Sea & Pacific Skipper	67.8	80.0	242.8	303.6
Small Boat Journal (6X)	55.8	41.1	98.4	82.7
Trailer Boats	50.0	31.1	162.6	107.0
Western Boatman (6X)	—	—	59.6	39.1
Yachting	191.1	149.6	758.9	638.3
Total Group	**1,119.7**	**958.8**	**4,205.5**	**3,628.8**
% change		**+16.7%**		**+15.8%**
— Canadian —				
L'Actualite	90.4	58.9	239.9	176.8
Chatelaine				
English Edition A	130.4	102.5	391.6	342.6
French Edition	105.5	96.1	326.1	308.2
City Woman (5X)	61.9	48.0	116.7	96.1
Financial Post Magazine A	69.3	46.0	170.9	135.5
Flare A	70.2	67.0	183.0	174.4
Homemaker's Magazine	75.6	69.4	231.6	244.8
Madam Au Foyer	67.3	57.8	223.3	195.8
Macleans (52X) A	145.1	105.9	438.2	349.4
Montreal Calendar	72.0	36.5	158.0	69.4
Montreal Ce Mois Ci	67.0	41.0	168.0	82.0
Quest Magazine (8X) A	42.1	48.4	68.5	96.9
Reader's Digest				
Canadian-English A	104.3	84.5	342.1	293.7
Canadian-French A	92.0	78.5	298.6	263.4
Toronto Life	115.3	104.7	324.9	299.1
Vancouver	57.0	69.8	239.2	280.8
Total Group	**1,365.4**	**1,115.0**	**3,920.4**	**3,408.9**
% change		**+22.4%**		**+15.0%**
— Civic/fraternal —				
American Legion	21.6	26.6	116.4	135.7
Elks Magazine (10X)	23.3	23.0	106.3	115.2
Kiwanis Magazine	11.6	11.0	49.9	61.7
Lion (10X)	6.6	3.3	31.7	21.8
Moose Magazine	23.0	24.0	96.0	99.0
Rotarian	15.1	10.0	62.5	50.8
V.F.W. (10X)	24.9	30.0	120.3	137.8
Total Group	**26.1**	**127.9**	**583.1**	**622.0**
% change		**-1.4%**		**-6.2%**
— Comics —				
Archie Comic Group (6X)	10.0	1.00	20.0	20.0
DC Comics	6.5	6.5	32.5	32.5
Marvel Comics Group	9.0	10.0	39.0	40.0
Total Group	**25.5**	**26.5**	**91.5**	**92.5**
% change		**-3.7%**		**-1.0%**
— General —				
American Forests	9.5	8.0	33.3	43.5
American Health (6X)	56.8	33.0	110.8	64.6
American West (6X)	29.2	22.3	54.8	51.7
The Atlantic A	75.3	44.2	187.0	155.9
Audubon Magazine (6X)	—	—	54.0	71.1
Bon Appetit A	94.1	84.0	304.1	304.8
Changing Times	42.8	42.8	184.9	153.3
Cuisine Magazine	59.3	39.9	202.4	128.9
Ebony	90.0	92.0	312.5	334.1
Fifty Plus	40.5	31.3	154.8	112.3
Food & Wine	36.0	34.5	139.7	131.6
Games	24.2	23.8	92.3	113.1
Geo	42.0	28.2	152.4	110.4
Gourmet	95.2	81.6	289.5	259.6
Harper's Magazine A	25.2	14.7	100.5	62.9
Life	53.2	50.5	215.4	208.4
Modern Maturity (6X)	34.1	60.4	79.3	81.0
Money	149.7	112.5	469.0	408.5
Moneyworth (4X)	—	—	27.0	34.6
Mother Earth News (6X)	51.0	68.9	113.8	140.6
Mother Jones (10X)	17.5	16.0	52.4	48.0
National Geographic	24.3	30.1	82.1	105.4
Natural History	55.4	46.2	194.7	156.5
Prevention	66.7	73.9	279.9	295.5
Psychology Today	23.1	26.2	93.0	103.0
Reader's Digest A	82.6	82.3	310.4	279.7
Saturday Evening Post (9X)	34.5	40.0	111.2	130.3
Signature	61.1	58.7	231.3	230.0
Smithsonian	99.8	71.1	357.3	297.8
Success	35.0	36.4	141.2	149.3
Town & Country	160.4	139.2	513.9	474.7
Travel/Holiday	58.9	49.2	219.5	193.5
Travel & Leisure	145.9	102.4	442.8	343.0
Vanity Fair	21.5	50.8	93.4	219.2
Video	64.3	60.2	261.1	254.7
Video Review	48.0	60.8	216.1	248.1
Writers Digest	19.9	22.6	103.5	96.6
Yankee	77.2	81.6	338.1	351.3
Total Group	**2,115.2**	**1,899.2**	**7,319.5**	**6,947.5**
% change		**+11.3%**		**+5.3%**
— Home —				
Americana (6X)	—	—	80.4	70.8
Architectural Digest A	164.9	146.9	477.9	455.1
Better Homes & Gardens	128.1	116.5	409.0	377.8
Colonial Homes (6X)	—	—	129.8	122.8
Country Journal	35.1	44.0	178.8	189.2
Country Living	66.7	50.0	233.8	184.4
Dallas/Ft. Worth Home & Garden	81.1	67.0	254.9	238.1
Early American Life (6X)	33.0	26.6	62.4	51.0
Family Food Garden (6X)	55.0	58.6	118.0	121.0
Family Handyman (10X) A	97.1	305.6	73.3	272.1
Flower & Garden (6X)	43.1	49.0	103.4	102.2
Home	86.3	39.5	223.7	135.5
Horticulture	30.1	28.9	113.2	133.2
House Beautiful	120.6	86.8	343.6	312.6
House & Garden	106.7	51.7	306.8	247.2
Houston Home/Garden	126.0	101.9	374.5	363.0
Metropolitan Home	56.8	63.1	217.6	218.1
New Shelter (9X)	41.7	40.3	194.2	182.7
1001 Home Ideas	45.0	33.0	148.3	123.4
Organic Gardening	71.0	75.5	331.4	359.9
Phoenix Home/Garden	58.0	50.0	233.8	178.3
San Diego Home/Garden	65.2	55.0	237.3	241.8
Southern Accents (4X)	—	—	130.8	81.3
Southern Living	174.6	166.4	511.6	488.2
Sunset Magazine A	179.7	159.9	524.8	513.1
Texas Homes	70.2	73.6	294.5	275.6
Workbench (6X)	—	—	131.1	134.5
Total Group	**1,936.0**	**1,889.8**	**6,438.9**	**6,172.9**
% change		**+2.4%**		**+4.3%**
— In-flight & other passenger —				
Aboard Group (7) (4X)	21.2	21.3	39.0	39.1
Alaskafest	51.6	43.0	174.5	153.7
American Way	114.7	96.8	411.7	332.1
East/West Network				
Amtrak Express	38.0	39.3	126.6	153.0
Continental	80.2	69.5	244.8	236.1
Eastern Skyview	114.5	106.3	468.2	356.8
Ozark	55.5	45.0	180.4	156.3
PSA Magazine	107.2	89.3	363.6	300.0
Pan Am Clipper	69.5	41.5	233.2	160.2
Republic Scene	73.8	56.5	238.7	191.3
United	110.2	98.3	424.5	328.6
USAir	66.8	57.5	242.5	211.3
Western's World	72.3	63.7	239.0	219.8
Halsey Publications				
Air Cal	57.0	45.5	191.6	125.4
Braniff	20.9	—	43.3	—
Delta Sky	78.3	66.0	307.4	244.6
Frontier	308	41.3	131.5	149.9
Hawaii	21.0	15.0	86.4	64.4
Northwest Orient	34.8	39.6	123.5	144.2
Pace (6X)	—	—	166.1	68.9
Skylife	19.3	22.0	72.8	53.5
Southwest Airlines	100.0	99.9	352.2	381.2
Spirit of Aloha	20.5	14.8	82.8	61.4
TWA Ambassador	65.1	52.0	235.2	183.6
Total Group	**1,423.2**	**1,224.1**	**5,179.1**	**4,351.4**
% change		**+16.2%**		**+19.0%**
— Men's —				
Esquire A	103.0	56.0	323.7	284.0
Firehouse Magazine	45.4	42.3	163.0	155.2
Gentlemen's Quarterly A	197.5	114.3	564.3	391.7
Penthouse A	47.1	54.1	180.7	208.8
Playboy A	77.9	86.6	269.2	299.0
Total Group	**470.9**	**353.3**	**1,500.9**	**1,338.7**
% change		**+33.2%**		**+12.1%**
— Metropolitan —				
Aloha (6X)	26.5	25.5	51.7	46.7
Atlanta	50.2	60.8	198.6	197.8
Baltimore	69.7	50.3	226.8	204.8
Boston	139.9	125.7	496.6	472.6
California D	61.3	77.3	196.7	200.2
Charlotte (10X)	18.0	27.0	59.3	85.1
Chicago	153.6	177.3	491.2	471.0
Chicago's North Shore	83.5	88.5	314.1	307.1
Cincinnati	43.4	54.9	172.3	201.1
Cleveland	59.0	68.2	266.7	247.0
Coast (38X)	422.5	291.1	774.1	631.2
Columbia Monthly	68.5	69.7	231.6	218.5
Commonwealth	42.3	21.5	153.1	101.8
Connecticut	90.8	84.7	306.1	286.5
Country Magazine	58.9	38.2	151.8	103.4
Cy Magazine: Dallas/Ft. Worth	141.9	124.2	335.8	295.7
Denver	24.5	42.1	122.9	101.6
Exclusively Yours, Wisconsin (15X)	110.5	109.9	256.3	272.7
Grand Rapids	47.0	51.7	192.3	179.1
Gulfshore Life (10X)	75.5	57.3	380.9	288.6
Honolulu	67.3	65.2	228.6	245.1
Houston City	87.4	69.4	289.9	236.1
Indianapolis	48.0	35.4	195.4	165.8
Kansas City	34.4	22.2	124.5	101.2
Los Angeles	199.0	181.5	699.0	655.5
Louisiana Life (6X)	66.1	69.9	129.3	137.9
Madison	45.0	40.0	185.0	160.0
Metropolitan Detroit	54.1	—	150.8	—
Miami/South Florida	122.6	91.6	373.8	343.0
Milwaukee	42.8	16.5	105.7	37.7
Minneapolis/St. Paul	104.5	94.4	332.5	298.1
Monthly Detroit	77.0	109.5	174.9	257.0
Nashville	37.0	44.0	147.0	202.0
New Jersey Monthly	50.1	54.1	195.8	188.1
New Mexico	30.6	23.0	105.6	58.1
Ohio	56.9	38.8	199.0	136.0
Orlando	115.0	71.8	337.3	288.8
Palm Beach Life	106.6	86.4	443.0	389.1
Palm Springs Life	114.0	122.7	567.4	561.3
Philadelphia	153.0	135.2	476.4	464.3
Phoenix	52.5	48.0	286.3	226.3
Pittsburgh	73.0	69.3	234.4	217.0
St. Louis	66.5	61.0	227.1	201.5
San Diego	171.3	164.2	539.8	532.6
San Francisco	66.7	64.4	239.3	215.3
San Francisco Focus	64.5	46.8	194.0	159.3
Shenandoah/Va Town&Country (6X)	—	—	97.0	63.6
Tampa Bay Monthly	43.3	—	199.6	—
Texas Monthly	152.9	132.5	444.2	404.7
Twin Cities	74.0	44.4	237.2	163.2
Washington Dossier	72.0	51.0	202.7	182.3
The Washingtonian	149.0	134.9	539.0	517.9
Total Group	**4,394.5**	**3,831.0**	**14,380.4**	**12,821.7**
% change		**+14.7%**		**+12.1%**
— Movie/romance/radio/tv —				
Macfadden's Women's Group				
Modern Romances	25.6	24.5	100.9	108.8
Secrets	25.6	24.5	100.9	108.8
True Confessions	25.6	24.5	100.9	108.8
True Experience	25.6	24.5	100.9	108.8
True Love	25.6	24.5	100.9	108.8
True Romance	25.6	24.5	100.9	108.8
Sterling Women's Group				
Daytime TV	27.5	30.3	109.0	122.7
Modern Screen	20.5	31.3	41.0	66.1
Movie Mirror (6X)	20.5	—	61.5	31.3
Soap Opera Stars	16.5	24.3	56.5	97.8
TV Movie Screen (6X)	5.0	—	5.0	66.1
TV Picture Life(6X)	20.5	—	61.5	29.3
Teen Bag (6X)	5.2	8.7	14.2	11.1
Total Group	**269.3**	**241.6**	**954.1**	**1,077.2**
% change		**+11.4%**		**-11.4%**
— Music/entertainment —				
American Film (10X)	29.3	28.2	102.3	108.7
Audio	57.7	42.0	232.2	169.3
Circus Magazine	41.9	20.3	141.9	97.9
Dance Magazine	71.0	75.3	264.7	257.5
Musician	59.3	57.8	244.5	235.9
Playbill	82.5	51.3	228.6	196.0
Record	31.3	6.1	88.5	21.7
Stereo Review	50.4	49.1	174.6	189.7
Total Group	**423.4**	**330.1**	**1,477.3**	**1,276.7**
% change		**+28.2%**		**+15.7%**
— Newspaper, Sun. magazines —				
Family Weekly A	60.8	62.6	293.1	326.2
Parade	53.3	54.6	229.5	287.2
Total Group	**114.1**	**117.2**	**522.6**	**613.4**
% change		**-2.6%**		**-14.8%**
— Outdoor & sport —				
Alaska	43.0	45.9	163.8	152.4
The American Handgunner (6X)	39.2	40.9	79.0	77.9
American Hunter	12.9	14.2	62.8	61.3
American Rifleman	25.7	29.2	102.0	99.1
Backpacker (6X)	—	—	74.2	85.9
Bass Master (8X) A	62.5	59.8	251.4	230.6
Bicycling (9X)	105.8	109.1	315.1	301.8
Field & Stream	106.5	119.7	353.8	400.0
Fins & Feathers A	68.3	53.1	234.9	203.2
Fishing World (6X)	—	—	116.3	120.3
Florida Sportsman	114.8	79.0	416.6	333.0
Flying	41.8	43.5	155.7	143.7
Fur-Fish-Game	23.2	22.5	94.1	86.7
Golf Digest	124.4	104.3	404.5	384.7
Golf Magazine	77.4	71.5	421.8	368.6
Guns	31.7	22.2	111.5	103.1
Guns & Ammo	48.1	58.8	161.4	186.0

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. D. Includes eight-page insert. E. 1984 year-to-date figure reflects 34.7 increase due to erroneous reporting by magazine in January. F. Includes *Home* Magazine-Part II. * All affiliated with Sunday Mag:Net except Los Angeles Times Home Magazine and New York Times Magazine.

(Continued on Page 98)

ad linage

(Continued from Page 97)

	Current month 1984	Current month 1983	Year-to-date 1984	Year-to-date 1983
Muscle & Fitness	103.0	105.0	423.0	417.0
Outdoor Life	92.1	94.7	350.8	319.7
Outside Magazine	53.6	59.3	137.2	111.3
Petersen's Hunting	31.0	36.9	120.1	127.3
The Runner	57.4	52.0	170.0	159.9
Runner's World (13X)	49.2	50.5	170.3	172.7
Salt Water Sportsman	95.2	68.7	345.2	270.7
Shooting Times	28.7	33.7	144.8	131.0
Ski (8X) A.	32.2	—	249.2	209.7
Skiing (7X)	—	—	215.3	209.5
Skin Diver	81.6	78.4	319.6	294.3
Southern Outdoors (8X)	52.6	58.8	147.5	159.4
Sport	54.2	45.0	180.7	136.2
Sports Afield	112.2	119.8	368.7	377.0
Tennis	113.1	96.8	295.4	283.1
Western Outdoors (10X) E	45.5	36.4	184.3	131.7
World Tennis	51.4	66.1	139.1	187.4
Total Group	**1,978.3**	**1,875.8**	**7,480.1**	**7,036.3**
% change		**+5.4%**		**+6.3%**

— Photography —

American Photographer	43.7	48.9	156.1	194.6
Petersen's Photographic	36.4	32.4	125.5	129.3
Popular Photography	88.6	114.4	367.5	458.9
Total Group	**168.7**	**195.7**	**649.1**	**782.8**
% change		**-13.7%**		**-17.0%**

— Religious —

BBI Jewish Monthly (10X)	28.4	20.5	93.2	89.9
Christian Herald	25.8	34.0	127.0	143.3
Christian Life	28.4	25.8	112.2	103.6
Christianity Today	69.7	59.2	261.2	282.5
Inside (4X)	—	—	90.3	70.0
Moody Monthly	57.9	48.5	216.8	220.0
Today's Christian Woman (6X)	—	—	65.8	32.7
Total Group	**210.2**	**188.0**	**966.5**	**942.0**
% change		**+11.8%**		**+2.6%**

— Science/electronic/mechanic —

Compute	80.1	135.2	376.5	504.6
Computers & Electronics	47.7	59.4	189.1	265.1
Creative Computing	118.9	180.0	542.5	724.9
Discover	32.5	37.5	154.6	166.5
Family Computing	58.1	—	242.7	—
Mechanix Illustrated	86.0	78.9	284.1	277.5
Omni	62.5	63.9	225.6	229.8
Popular Mechanics	110.3	115.4	381.3	381.8
Popular Science	100.7	103.3	348.5	329.7
Science Digest	31.6	26.5	104.9	125.2
Science 84 (10X)	31.0	30.1	120.8	117.3
Scientific American	73.3	42.8	252.5	178.8
Spectrum	98.7	79.6	378.0	311.7
Total Group	**931.4**	**952.6**	**3,601.1**	**3,612.9**
% change		**-2.2%**		**-0.3%**

— Women/fashion/service —

Bride's Magazine (6X) A.	—	—	737.5	724.1
Cosmopolitan A.	235.8	224.3	772.0	727.5
Essence	84.6	80.6	307.8	299.1
Family Circle A.	109.9	122.1	517.1	548.2
Glamour	226.4	183.3	655.9	610.4
Good Housekeeping A.	198.4	182.2	604.0	631.4
Handmade (6X)	—	26.3	52.8	56.7
Harper's Bazaar	152.0	156.1	566.3	494.8
Health	28.2	36.6	139.5	114.5
Ladies' Home Journal	92.6	81.3	392.0	343.4
Ladycom	33.3	19.8	146.8	120.5
Lady's Circle	7.1	8.9	29.9	37.5
Mademoiselle	178.5	144.5	519.4	464.4
McCall's	84.4	72.2	334.2	313.0
Modern Bride (6X)	—	—	624.7	597.9
New Woman	48.3	42.0	187.5	171.5
Parents Magazine A.	83.2	75.8	280.7	282.2
Playgirl	31.3	39.7	175.2	194.9
Redbook	83.5	69.6	332.9	300.1
Self	113.8	82.0	354.0	275.3
Seventeen	151.8	121.9	474.5	369.4
Shape	60.0	54.0	214.0	176.0
Soap Opera Digest	25.2	23.0	109.0	87.2
'Teen Magazine	55.8	53.6	171.4	170.4
True Story A.	69.1	51.8	225.8	220.2
Vogue	250.2	238.1	995.7	885.7
W Magazine	94.6	74.2	472.0	395.3
Weight Watchers	26.3	27.0	117.8	108.2
Woman's Day A.	207.0	204.0	485.1	491.6
The Workbasket (10X)	32.5	30.2	157.1	157.2
Working Mother	64.3	51.6	256.6	240.0
Working Woman	107.2	95.1	356.2	343.2
Total Group	**2,925.3**	**2,671.8**	**11,765.4**	**10,951.8**
% change		**+9.4%**		**+7.4%**

— Youth —

Boys' Life	17.2	21.9	67.7	90.1
Campus Life	37.6	34.8	194.0	186.5
Total Group	**54.8**	**56.7**	**261.7**	**276.6**
% change		**-3.3%**		**-5.3%**

March

	Current month 1984	Current month 1983	Year-to-date 1984	Year-to-date 1983

— Business —

Atlanta Bus. Chronicle (52X)	52.3	20.9	129.3	83.4
Austin Business Journal	32.6	—	97.9	—
Barron's (52X)	189.4	195.8	568.7	566.6
Black Enterprise	37.5	48.1	137.2	134.7
Boston Business Journal	81.7	60.9	239.5	162.8
Business Week (52X) A.	426.7	390.2	1,014.0	959.0
California Business	72.8	53.6	201.7	142.6
Capital District Bus. Review	36.0	38.2	120.0	104.3
Corporate Report/Kansas City	63.2	49.6	196.3	131.4
Corporate Report/Minn.	89.3	81.2	235.8	229.0
Crain's Chicago Bus. (52X)	131.1	111.5	375.8	310.0
Crain's Cleveland Bus.	64.0	44.7	176.7	138.4
Dallas/Ft. Worth Bus. (52X)	46.4	32.1	114.7	103.1
Dun's Business Month	61.0	68.0	183.0	174.0
The Executive	37.5	30.8	137.9	110.4
Financial World (24X)	34.0	53.1	86.8	120.8
Florida Trend	79.8	64.4	242.3	195.3
Forbes (26X)	287.1	253.5	773.2	647.3
Fortune (26X) A.	266.8	202.4	654.6	495.2
Frequent Flyer	60.2	47.2	151.1	124.3
Hawaii Business	45.0	45.5	124.8	134.3
High Technology D.	29.8	25.6	80.5	74.4
Houston Bus. Journal (52X)	141.4	134.9	400.4	437.0
Inc. Magazine A.	98.3	84.2	292.8	252.7
Income Opportunities (10X)	52.3	50.1	118.7	116.6
Industry Week (26X) A.	100.5	89.7	282.3	254.8
Indianapolis Business Journal	91.2	86.6	301.8	265.3
Nation's Business A.	27.1	29.7	64.2	77.1
New England Bus. (20X) B.	78.9	77.3	179.6	167.5
New Orleans Citibusiness	114.7	114.4	338.1	330.0
Pacific Business News (52X)	110.1	94.2	295.3	276.9
Philadelphia Bus. Journal	93.4	59.8	262.2	158.6
Pittsburgh Bus. Times (52X)	58.9	44.2	144.5	133.8
Savvy	45.1	43.3	128.3	120.9
St. Louis Business Journal	121.0	95.1	374.4	279.6
Texas Business	60.9	48.5	170.7	128.1
Venture	71.3	53.8	182.6	155.3
Total Group	**3,489.3**	**3,023.1**	**9,577.7**	**8,295.5**
% change		**+15.4%**		**+15.4%**

— Newspaper Sunday magazines* —

Arizona Republic	59.6	87.1	175.7	223.9
Boston Globe	200.7	192.2	541.1	462.1
California Living	63.8	52.5	155.5	139.8
Chicago Tribune	69.3	96.6	174.9	232.1
Cincinnati Enquirer	69.6	85.3	194.2	218.8
Cleveland Plain Dealer	69.6	99.1	148.7	207.3
Columbus Dispatch	55.1	41.2	125.9	112.6
Detroit News	91.9	112.0	241.4	271.9
L.A. Times Home Magazine F.	139.1	82.4	314.2	198.4
Louisville Courier-Journal	80.5	123.3	200.8	261.1
Miami Herald	49.2	64.7	143.9	173.4
New York News	22.6	51.5	138.3	142.0
New York Times Magazine	671.7	432.3	1,123.7	969.6
Philadelphia Inquirer	64.6	82.9	170.5	189.0
Toledo Blade Magazine	47.3	49.6	111.9	141.4
Washington Post	141.9	133.2	303.5	293.0
Total Group	**1,897.5**	**1,785.9**	**4,264.7**	**4,236.4**
% change		**+6.2%**		**+0.6%**

— Weeklies/bi-weeklies —

The Advocate (25X)	88.2	96.2	302.3	327.8
Army Times Military Group:				
Air Force Times (52X)	146.8	132.2	407.5	407.0
Army Times (52X)	140.8	124.2	391.1	391.0
Navy Times (52X)	156.8	150.5	446.8	463.5
The Times Magazine	21.8	20.7	43.8	35.8
The Blood-Horse (52X)	549.8	592.7	1,763.3	1,719.0
Capper's Weekly (26X)	25.6	45.1	99.4	99.1
Commonweal (22X)	9.9	6.3	26.0	22.8
Golf World (43X)	76.8	67.2	192.3	179.3
Grit (52X) A.	22.2	29.3	85.5	95.0
National Journal	33.5	26.0	82.5	72.0
National Review	26.7	36.4	75.0	93.6
New Republic (48X)	28.6	31.9	81.8	84.1
New York Magazine (50X)	231.1	208.1	546.2	551.1
New Yorker (52X)	302.5	306.1	769.5	781.5
Newsweek (52X) A.	240.4	187.8	620.7	581.0
People (52X)	717.3	687.6	326.1	287.3
Rolling Stone (25X)	126.3	99.7	253.0	207.2
Sporting News (52X)	44.6	47.5	143.9	150.8
Sports Illustrated (52X) A.	187.6	199.7	592.0	579.4
Time (52X) A.	214.9	206.7	586.6	590.5
TV Guide (52X) A.	340.5	291.8	1,027.4	1,003.7
Us Magazine (26X)	40.7	40.5	117.2	131.0
U.S. News &				
World Report (52X) A.	131.7	144.1	338.2	390.4
Total Group	**3,904.7**	**3,778.3**	**9,318.1**	**9,243.9**
% change		**+3.3%**		**+0.8%**

— Foreign —

Good Housekeeping Foreign Editions:				
Australia	25.0	19.9	89.7	83.5
Japan	58.6	63.7	181.4	153.4
Great Britain	111.4	83.0	230.9	198.8
Buenhogar:				
Central America	—	1.0	—	2.0
Chile	—	1.0	—	1.0
Colombia	15.0	38.2	38.7	78.0
Dominican Republic	4.5	10.0	12.5	27.0
Ecuador	9.0	4.0	25.0	13.3
Mexico	35.0	82.8	71.8	157.7
Peru	13.5	11.5	29.0	28.8
Puerto Rico	14.5	11.5	32.5	29.8
U.S.	11.0	8.0	33.0	20.3
Venezuela	13.5	25.0	36.0	60.0
Geomundo:				
Central America	3.0	6.0	8.8	8.0
Chile	3.0	7.0	7.8	11.0
Colombia	4.0	8.5	14.0	19.5
Ecuador	2.0	5.0	6.0	9.0
Mexico	6.0	8.5	10.8	16.5
Peru	3.0	7.0	7.8	10.0
Puerto Rico	2.0	5.0	5.8	8.0
U.S.	4.0	1.0	8.5	2.0
Venezuela	10.5	12.0	24.3	30.2
Hombre De Mundo:				
Central America	4.0	6.3	12.0	14.3
Chile	5.0	5.0	13.0	13.0
Colombia	9.0	6.0	18.0	23.5
Ecuador	6.0	5.0	13.0	15.0
Mexico	8.5	11.5	17.5	26.0
Peru	5.0	4.0	12.0	9.0
Puerto Rico	5.0	5.3	11.0	13.8
U.S.	4.0	2.0	7.0	3.0
Venezuela	10.0	11.0	30.0	44.3
Ideas Para Su Hogar:				
Colombia	11.0	18.0	26.0	42.5
Ecuador	3.0	3.0	11.0	4.0
Mexico	5.2	22.2	11.5	55.0
Peru	4.0	2.0	11.5	7.0
Puerto Rico	—	1.0	0.5	1.0
U.S.	6.0	2.0	17.5	2.0
Venezuela	10.2	16.0	24.2	34.0
Mecanica Popular:				
Argentina	8.2	6.5	18.8	20.0
Central America	13.7	10.8	35.2	36.5
Chile	6.8	5.7	14.8	17.5
Colombia	12.8	14.8	32.5	48.0
Mexico	9.5	11.7	26.0	30.5
Peru	16.3	13.2	39.7	46.5
Puerto Rico	15.8	12.3	39.0	39.2
U.S.	4.0	1.0	9.7	4.0
Venezuela	15.0	21.2	39.0	64.0
The Ring en Espanol:				
U.S.	3.0	2.0	6.3	6.0
Venezuela	1.0	—	2.0	3.0
Vanidades Continental:				
Central America	0.8	4.0	7.5	12.2
Chile	—	5.0	—	11.3
Colombia	20.8	60.3	72.7	115.8
Dominican Republic	2.7	20.8	11.3	46.2
Ecuador	8.7	10.3	28.0	22.8
Mexico	71.5	168.7	139.5	288.0
Peru	13.2	23.5	29.5	54.0
Puerto Rico	23.0	40.2	60.7	93.8
U.S.	31.5	54.8	98.3	125.5
Venezuela	25.2	62.8	68.2	136.2
Business Week Int'l.	127.9	145.3	284.5	348.9
Cosmopolitan Foreign Editions:				
Australia	39.3	50.3	118.7	140.3
Brazil	27.0	40.5	81.0	102.5
France	197.2	85.6	372.2	153.4
Germany	123.5	59.6	215.9	112.6
Great Britain	98.0	96.0	232.3	205.0
Greece	44.0	38.0	110.0	115.0
Holland	49.0	27.0	84.0	45.0
Italy	58.0	79.6	101.7	139.6
Japan	22.3	32.3	76.7	92.2
South Africa	68.1	—	68.1	—
Cosmopolitan en Espanol:				
Central America	—	2.8	—	6.0
Colombia	5.0	8.3	8.2	26.5
Ecuador	—	0.7	—	3.0
Mexico	36.5	85.3	73.5	145.7
Peru	1.0	6.7	1.0	17.0
Puerto Rico	22.2	18.7	44.5	46.2
U.S. (Spanish language)	17.0	14.7	50.5	41.7
Venezuela	9.0	13.8	24.0	35.8
International Communications:				
African Business	18.3	31.6	51.7	92.4
New African	18.3	15.3	51.3	68.8
The Middle East	18.3	41.0	54.9	79.4
International Management:				
Africa	14.0	17.2	32.9	44.5
Europe	37.0	44.3	81.8	96.3
Latin America	5.0	7.0	19.3	22.0
Middle East	10.0	19.5	40.2	42.2
Pacific	13.8	17.2	31.2	43.2
Johnston International:				
Alam Attijarat	44.0	60.5	134.3	156.6
Ejecutivo	4.2	12.0	10.5	20.3
Modern Africa	20.0	19.3	32.7	37.8
Modern Asia	19.0	34.7	39.0	68.8
Newsweek International A.:				
Atlantic	87.2	85.7	197.6	198.2
Latin America	28.2	28.4	66.5	77.0
Pacific	61.6	71.7	160.8	161.3
Progreso (9X)	3.3	8.3	9.8	19.3
Reader's Digest:				
Arabic	—	9.5	8.0	26.0
Asian	170.0	178.0	583.0	699.5
Australian	71.0	71.8	274.4	224.1
Belgian-Flemish	130.5	142.0	203.0	315.0
Belgian-French	103.5	116.5	165.0	255.5
British	39.3	61.8	168.4	240.2
Chinese B.	71.0	71.5	346.5	249.8
Danish	53.5	45.5	161.6	167.6
Dutch	36.5	27.3	125.5	103.1
Finnish	66.0	67.0	139.0	167.5
French	50.0	62.8	119.0	210.4
German	72.1	75.8	266.7	269.8
Greek	—	—	7.5	—
Iberian	14.0	11.0	46.0	60.5
Indian-English	—	98.0	137.0	233.5
Indian-Hindi	—	5.0	7.0	8.0
Italian	46.0	55.0	148.5	176.0
Japanese	40.2	53.4	144.3	191.3
Korean	33.0	17.8	78.0	53.9
Latin American:				
Argentina	14.0	12.0	60.5	29.0
Brazil	—	11.0	4.0	42.0
Central American	8.0	9.5	23.0	32.0
Chile	9.5	9.0	46.0	33.0
Colombia	—	29.0	47.0	79.5
Ecuador	8.0	6.5	32.0	26.0
Mexico	56.3	49.2	111.7	169.3
Peru	8.0	7.5	33.0	24.5
Puerto Rico	8.0	6.5	24.0	18.5
U.P.B.	8.0	8.5	26.0	31.0
U.S. Spanish	4.5	10.5	23.0	43.0
Venezuela	9.0	17.5	31.0	41.0
New Zealand	70.0	79.5	190.5	284.5
Norwegian	41.5	45.5	136.6	135.5
Portugal	36.6	52.5	112.2	150.0
South African	81.5	76.5	305.3	272.0
Swedish	13.5	32.0	67.0	95.5
Swiss-French	33.3	42.0	103.9	119.7
Swiss-German	45.6	52.6	141.4	152.2
Time International:				
Time-Asia	91.5	74.9	203.4	192.8
Time-Atlantic	101.9	85.1	219.9	216.4
Time-Canada	185.9	146.7	449.5	355.8
Time-Latin America	38.4	37.8	89.8	98.1
Time-South Pacific	108.3	125.6	248.5	280.9
Visao (52X)	126.8	126.0	352.3	357.9
Vision/Latin America (26X) A.	24.0	17.7	52.1	60.8
Total Group	**4,223.8**	**4,749.2**	**11,087.0**	**12,493.3**
% change		**-11.0%**		**-11.2%**

Lawyers

(Continued from Page 3)

Court cleared the way in the late 1970s, now face a steady stream of aggressive rivals.

The veterans think some of the newcomers are making the profession look shabby with their hard-sell spots. But the familiar, big-spending firms have been forced to adjust their promotion strategy to be more competitive.

The shifting to radio, for instance, has become noticeable among some firms.

Jacoby & Meyers, No. 2 in the Television Bureau of Advertising/Broadcast Advertisers Reports rankings, has shifted a major part of its budget to radio. Last year, the firm cut its tv budget for general, nonbusiness work in four cities to $823,200 from $1.7 million, according to industry estimates.

Shifting to radio

In Los Angeles, partner Steve Meyers said escalating tv rates had prompted the firm's in-house agency, J&M Advertising, to shift 30% to 40% of the ad budget to other media, especially radio. The move, Mr. Meyers said, "is working out fine."

Radio and tv commercials emphasize Jacoby & Meyers' record of serving 400,000 clients in recent years and suggest that folks in need of legal help "ask a friend and he might recommend us."

The firm plans to spend about the same amount this year as last.

At Hyatt Legal Services, No. 1 on the list, a fresh campaign should be coming soon from its new agency, Isidore & Paulson.

Joel Hyatt, senior partner and on-air spokesman for the expanding chain, boosted his tv budget 36% to $3 million in 1983. The firm mixes newspapers with tv and stresses convenient, affordable, personalized services for everything from adoption to wills.

A spokeswoman would not say how much the firm's advertising will be boosted this year as the Hyatt partnership opens branches in Houston, Seattle, Indianpolis, Dallas and Portland, Ore.

The chain operates in 18 markets, including Baltimore, where the lawyer glut seems acute.

Baltimore placed five firms in the top 20 advertisers circle. They range from Saiontz & Kirk, with an estimated outlay of $395,000 to Cohen Dwin & Farfield, at $152,000.

Ronald M. Sharrow, who poured $246,600 into tv last year, has become a local celebrity through his commercials.

When he first went before the cameras in 1978 offering to handle personal injury complaints on speculation, he had a one-lawyer operation. Today he has five other lawyers on a 20-person staff and has branched out into criminal law. While his gross has increased from $300,000 to $2 million, he believes he may have reached the saturation point in tv. The budget may be cut to $200,000 or less in 1984.

His latest ads subtly needle his rivals. A typical spot grabs the viewer with a car smashup scene and asks: "If you had an accident, where would you turn for help?" The camera switches to Mr. Sharrow, who says something like: "A lot of lawyers think we are so successful and leaders because we were the first to get on tv. The fact is we are leaders because we get results and are aggressive. You might as well follow the leaders too; everybody else is."

Despite the lawyer-cluttered airwaves, Mr. Sharrow remains a tv booster. His ad shop, Pro Ads, handles his office and other clients.

Larry H. Parker Law Office, Long Beach, Cal., No. 3 among legal advertisers at $562,200, flies to Baltimore to tape spots under Mr. Sharrow's direction.

Tv's value questioned

One law firm that maintains some caution over tv advertising is Cohen Dwin & Garfield, Baltimore. "We don't know if tv has been worth the money," said Harold Dwin of the firm's own tv campaign. "It's expensive and it takes a long time to know if we are going to win workmen's compensation or other accident cases."

He is worried about the din of legal voices in Baltimore and the pressing technique of those who come on like pitchman for storm windows.

Cohen Dwin & Garfield, whose ad budget will go up about 10% this year, gets soft-sell generic commercials from Norton Frickey & Associates in Denver.

Mr. Frickey said he places nearly $4.5 million annually on tv for the 113 law firms in his Network Affiliates syndicate. His own firm, with a $556,400 budget, was No. 4 on the TvB list.

Mr. Frickey's ad agency, NF Advertising, produces a fresh supply of spots every six weeks to be tagged locally and booked in daytime periods.

He favors a restrained, informational approach, with ads designed to tell people of limited means where to turn when they need guidance in the legal maze. Many of the Frickey ads focus on industrial workers on the job.

"We don't use ambulances or hospital scenes, but some of our competitors do," Mr. Frickey said. "And that's tacky."#

Bills deck Tech HiFi chain

RANDOLPH, MASS.—Chapter 11 bankruptcy papers filed in U.S. district court in Boston indicate that Tech HiFi has 598 creditors, who are owed $21.9 million, while the audiovideo chain claimed $17.1 million in assets.

Among the creditors is Corinthian Media, New York, which handled media placement. Corinthian, which was not listed among the 20 companies owed the most money, had no comment on the Tech HiFi action.

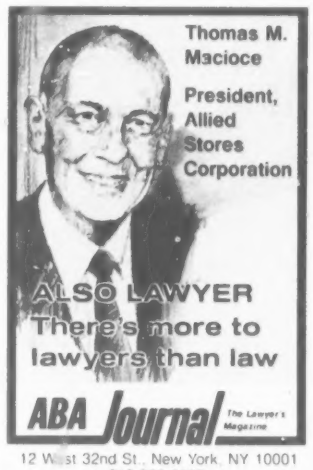
Tech HiFi has an in-house agency, Ad Infinitum.

Tech HiFi, a 70-store chain mainly on the East Coast, filed for bankruptcy protection on April 10. The chain plans to close 14 stores in Michigan and Ohio and sell its North Carolina subsidiary with four stores.#

DMA elects council heads

NEW YORK—The Direct Marketing Assn. elected new officers to chair 10 of its special-interest councils during its annual spring conference in Phoenix.

New council chairmen and vice-chairmen are: Erv Magram (Lew Magram Ltd.) and Suzanne Taliferro (Tolliver) on catalogs; Annette Brodsky (Accredited Mailing List) and Marcella Lieberman (Prestige List Service), lists; Al Dyon (Allstate Insurance Co.) and Cheri Rodolfo (Fireman's Fund American Life Insurance), insurance; Ira Belth (Belth Associates) and James Rice (McGraw-Hill), business-to-business marketing; John Booth (Direct Marketing Group) and James Wolf (Mellon Bank), financial services; James Aldige III (Viguerie Co.) and John Temple (Guidepost Associates), fund-raising; David Shepard (David Shepard Associates) and Ronald Gerwin (American Express), marketing; Peg Kuman (Publishers Clearing House) and Robert Borders (Wometco Home Theaters), telephone marketing; Bernice Grossman (Direct Marketing Resource Services) and Jack Doyle (Rodale Press), circulation, and Michael Green (Direct Marketing Research Associates) and Emma Hildreth (Meredith Corp.) as acting heads on the council.#



12 West 32nd St., New York, NY 10001
212-868-6220

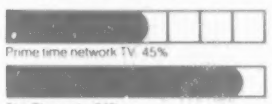
to add The Chronicle to your broadcast buy.

Houston cable penetration now stands at 40%. And among adults with household incomes over $35,000, the ones you want to reach most, 48% subscribe to cable.

What you get is a TV picture so hopelessly fragmented, it's virtually impossible to cover Houston with broadcast.

Solution? To increase your reach and frequency, make The Chronicle the primary part of your Houston media plan. As the largest newspaper in the Southwest, Chronicle penetration among adults with household income of $35,000+ is unmatched.

For example, a one week, $25,000 prime time local network spot TV schedule in Houston delivers only 45% of adults living in $35,000+ households. An equal investment in The Chronicle delivers 64% of these affluent adults*



That's 142 extra GRP's. At no extra cost.

For a detailed media comparison, call our Research Manager collect, 713/220-7401. Under the circumstances, it's the only reasonable thing to do.

Houston Chronicle
The Primary Advertising Investment

*Source: Belden Multi-Media Study, 1983. Based on nine 30-second spots on local network affiliates, SAR estimates, versus five 1575-line Chronicle ads at national rate. Represented nationally by Sawyer Ferguson Walker.

4/27/84
L2710-1

Advertising Age®

Entire contents copyright 1984 by Crain Communications Inc. All rights reserved.

$1.25 a copy; $52 a year *The International Newspaper of Marketing • In Two Sections, Section 1.* *April 26, 1984*

TI's campaign dares consumers to compare the TI Professional Computer to IBM's Personal Computer.

TI 'dares' to take on IBM

By TOM BAYER

DALLAS—Texas Instruments tackles IBM April 30 in a comparative marketing effort that "dares" consumers to compare the TI Professional Computer to the IBM Personal Computer.

Asserting that IBM may have the most widely recognized name in personal computing, TI officials are staking a claim of "superiority" in side-by-side demonstrations at most of the 760 authorized TI dealers and at many ComputerLand outlets.

With its reputation and marketing clout, IBM has established the IBM PC as the standard for competitors, thus the spate of comparisons and personal computer products claiming to be "IBM compatible." The personal computer market has seen some comparative advertising aimed at IBM, but none has been so blatant as TI. McCann-Erickson, Houston, is TI's agency.

TI will characterize its budget only as "multi-million-dollar," but the intention is to raise the national awareness of TI's computer, capitalizing on favorable reviews and comparisons in the computer press.

The 90-day aggressive merchandising program will

(Continued on Page 5)

ABC poised for 'imminent' ESPN buyout

By SUSAN SPILLMAN

NEW YORK—ABC Video Enterprises, a wholly owned subsidiary of ABC Inc., is expected to make a bid for the Entertainment & Sports Programming Network this week.

At an April 23 meeting, ABC Inc. top brass debated which of several options to take in moving toward acquiring ESPN, ADVERTISING AGE has learned.

A deal "is imminent," said a source close to Texaco, the cable network's majority shareholder. At press time, Texaco said it had gotten no formal offers.

ABC's options include buying the cable sports service outright or finding a partner. James Abernathy, vp-corporate affairs for ABC Inc., said only, "We're certainly interested in ESPN under the right circumstances."

ABC owns 15% of the cable network through a $25 million deal it struck in January with former ESPN majority owner Getty Oil.

In mid-February, Texaco bought Getty for $10.1 billion and with it inherited 70% of ESPN. Texaco has said it wants to unload the cable network. The remaining 15% of ESPN is owned by the cable network's founder, Bill Rasmussen, and his family and other original individual investors.

News of ABC's intended bid for ESPN follows reports from Turner Broadcasting Systems that it also is interested in buying ESPN (AA, April 9). A Turner spokesman said his company still planned to make a bid "in about two weeks."

When ABC purchased its current 15% interest in ESPN, the company got the right of first refusal to buy the remainder of Getty's—now Texaco's—interest in ESPN. The network is the country's largest cable network and is valued at about $200 million.

Other companies rumored to be interested in ESPN include Coca-Cola, Gulf & Western, Time Inc. and Anheuser-Busch.#

Saatchi chasing a stake in Japan

LONDON—Saatchi & Saatchi is pushing to gain a big stake in Japan, where it has virtually no presence now, and do it quickly, sources say.

The Saatchi brothers, Maurice and Charles, founders of the London-based agency, don't think they can reach their goal of having one of the top 10 agencies in each of the 10 largest markets in the world by 1986 without strong representation in Japan.

The company includes Saatchi & Saatchi Compton Worldwide, McCaffrey & McCall, Dorland Advertising and Crawford Hall Partnership.

Japan is important because multinational clients are increasingly interested in lining up accounts with agencies that have worldwide coverage, particularly in Japan.

"The Saatchis have been talking to anybody and everybody in Japan," said one source.

One agency that Saatchi executives have had numerous conversations with is Sanyu, owned 60% by Dai-Ichi Kikaku, the fifth-largest agency network in Japan.

Sanyu originally was set up by DIK to handle advertising for industrial products made by companies affiliated with Mitsubishi. In 1983, Sanyu had gross income of $1.9 million on billings of $14.4 million.

Sources say the Saatchi goal was to take a minority share of Sanyu, and quickly build that up to a majority share, then complete control.

However, the Saatchi goal of taking over a Japanese agency may be a long way off, as even Saatchi executives admit privately.

The grab for Sanyu has been stymied, according to one source, partly because of the close and broadening DIK relationship with Doyle Dane Bernbach.

For example, two weeks ago DDB and DIK joined forces with Japan Counselors, a leading Japanese public relations agency, to form an international public relations company called DDJ (AA, April 23).#

Stan's saucy snipe

By NANCY GIGES

Stan Freberg's offbeat humor has turned up in a new campaign for Prince spaghetti sauce.

Prince's sauce division, based in Pennsauken, N.J., has bypassed agency Venet Advertising, New York, for a humorous campaign created by Freberg Ltd. that refers to the 1984 Summer Olympics without actually mentioning the event. The spot could open a whole new area of "almost-Olympic" campaigns.

Prince apparently has taken this approach to gain attention in a category in which competitors outspend Prince many times over. The lion's share of Prince's ad dollars go into its pasta, which is a leading brand in New England and Chicago and No. 2 in a number of other major markets.

The Prince sauce commercial running in New England, upstate New York, Chicago and Philadelphia opens with a woman noting, "Not the official spaghetti sauce of the 1984..." Man: "Hold it. Not the official?" Woman: "No. Prince probably could be. If we wanted to plunk down millions of dollars to be the official...uh...you know,

(Continued on Page 5)

KTVT set to dish out

TULSA, OKLA.—United Video, a satellite carrier, will begin offering KTVT, Dallas/Fort Worth, via satellite starting July 1.

The move would give the independent station the potential of growing into a superstation going beyond its market area.

United Video expects KTVT, owned by Gaylord Broadcasting, to reach 1 million households by the end of 1984. Testing of the transmission is to begin June 15.

United Video provides satellite transmission of superstation WGN, a Chicago independent, and just recently added New York independent WPIX.#

Big Mac makes the big leagues

By ROBERT RAISSMAN and SCOTT HUME

The decision by the presidents of the American and National Leagues to permit players to wear McDonald's Golden Arches on their wristbands may lead to other major league players selling other parts of their uniforms to advertisers.

"It's a disastrous decision," said a source in the Commissioner of Baseball's office. "They [the American and National league presidents] didn't envision what could happen when they allowed McDonald's to use the wristbands." The source said the decision sets a precedent.

McDonald's was given permission by the leagues in support of the company's Ronald McDonald House Team (AA, April 23).

McDonald's wants at least one player from each major league team to join. They will visit sick children at Ronald McDonald Houses and they also will be allowed to wear the McDonald's wristbands on the field.

The USFL, NFL and NBA all prohibit players from wearing logos on their uniforms.#

Golden Arches logo is visible on Darryl Strawberry's wristband in this *Sports Illustrated* photo.

NEWSPAPER

F

AA DC2001ACONGLI FMJF M
CONGRESSIONAL INFO SERVICE
SRI ACQUISITIONS
4520 EAST-WEST HWY #800
WASHINGTON DC 20014

It virtually pervades our everyday lives. Consumers are comfortable with and knowledgeable about the process. The media devotes more time and space to explaining and dissecting it. Companies recognize its growing importance to their very survival.

The Marketing Phenomenon

By Charlene Canape

No one has to tell Ellen Metcalf of Arthur D. Little, the Boston-based research company, that today's consumers know about marketing.

Several years ago, Ms. Metcalf was collecting consumer comments on the newly introduced RCA videodisc player (which RCA recently decided to abandon). "With any new product, we always had people who said, 'I'm going to wait to buy until the bugs are out of the system.' " But this time, the consumers demonstrated they understood the basic principles of marketing, she says.

"The people we talked with [about the RCA player] said they would wait to buy until there were more competitors, because then prices would come down, the product would be improved and over-all they would get better value for their dollar. The fact that they went through that process was amazing to me," the head of Little's consumer industries unit says.

Surprising or not, it is a fact that marketing has become an accepted—even expected—part of American life and a rapidly growing one at that. Nowhere is this more evident than in dollar figures. In 1970, ADVERTISING AGE reported that the 100 leading national advertisers spent $4.62 billion on advertising. Just 12 years later, that figure had ballooned to $17.1 billion, a whopping 270% increase.

Instead of rebelling against this marketing system, the consumer is using it to his advantage. "I see a new wave consumer who is unwilling to accept brand name, price or past experience as surrogates for value," Ms. Metcalf says. "This consumer has much higher standards now than in the past."

Many executives view this marketing-savvy consumer as the inevitable result of the current business environment in which a large number of competitors seek to market similar products. A good example is the personal computer industry. Theodore Levitt, a professor of business administration at Harvard and author of the recent book "The Marketing Imagination," notes it is no longer necessary to be a technical wizard to get into the computer business because most marketers buy the same component parts from manufacturers. "You very quickly reach product parity," Mr. Levitt says. "The effort to find ways of competing more effectively on other grounds intensifies, and those other grounds get defined as marketing."

In a fierce marketing battle, the company with the largest share of business fights to hold onto its customers, while challengers strive to take those customers away. Of course, competitors always have fought for customers, but today these battles are played out for the consumer in living color on the tv screen.

Burger King announces in its tv commercials how many customers it has won from McDonald's. MCI and Sprint Telephone Service commercials encourage phone users to switch to one of those long-distance services from AT&T. Pepsi-Cola presents filmed evidence of people being convinced that Pepsi tastes better than Coke.

If the consumer watching these commercials still manages to miss the underlying message that marketing is taking over, the press is there to hammer the idea home. Most major publications now devote more space to covering marketing in the business pages and in general trend and "living" sections.

According to Hall's Editorial Reports, an organization that measures the editorial content of the nation's top weekly magazines, coverage of business in general has increased steadily since 1980. *Time*, for example, devoted 336 pages to business news in 1983, compared with 230 in 1980. Whit Raymond, a senior analyst at Hall's, says he believes that more coverage of marketing news accounts for part of that increase.

Even tv appears fascinated with the subject. Last month, Edward Ney, chief executive officer of Young & Rubicam, was the profile feature interview on "Business Times," an Entertainment & Sports Programming Network morning program. During a recent week, ABC's "Good Morning America" devoted one segment a day to discussions of marketing and advertising.

Marketing may be big news now, but the concept is as old as civilization. In its early stages, marketing simply meant the exchange of goods for goods or services. Through the ages, merchants began to improve on this simple sales technique. Instead of waiting for the customer to pass by the shop, store owners began to investigate ways to attract customers.

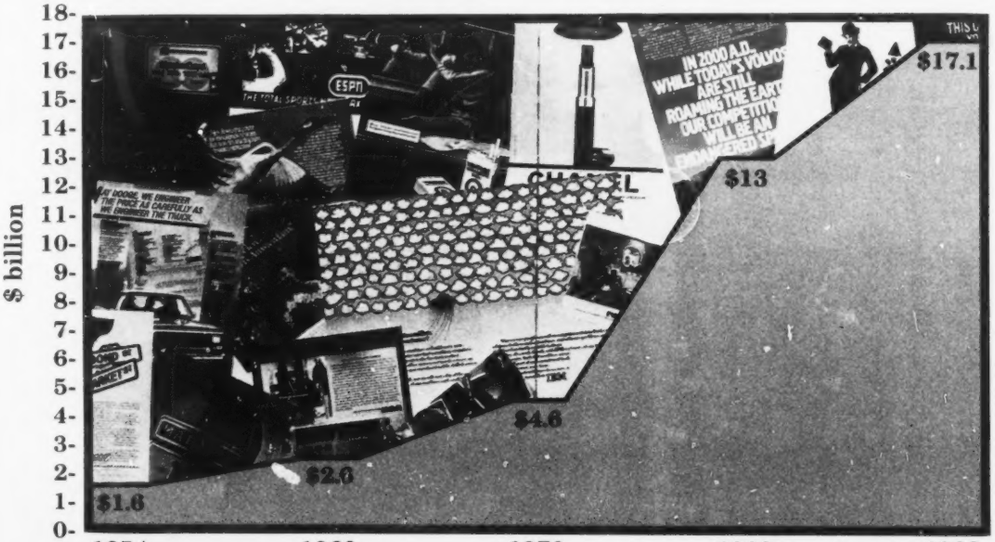
John J. McNamara, president of Young & Rubicam USA, says he believes that "modern marketing," or marketing as a science, was an outgrowth of the post-World War II era. "The war led us out of our worst economic depression and set the stage for the unparalleled expansion of those glorious postwar years," Mr. McNamara says. "Especially critical to marketing was the emergence of a true mass market as a new and increasingly prosperous middle class swelled in size."

Two other developments during this time—the supermarket and the baby boom—continue their influence. The supermarket rapidly took over as the best

Charlene Canape is an ADVERTISING AGE contributing editor based in New York.

ADVERTISING AGE's 100 Leading National Advertisers . . . and how they grew

Total ad expenditures in $ billion (including unmeasured media)



ADVERTISING AGE 100 Leading Advertisers

Almost three decades of advertising spending is represented in this graph that starts with the first ADVERTISING AGE compilation of advertising expenditures by the 100 leading national advertisers, published by AA in 1956 reporting the figures from 1954 and 1955.

way for marketers to distribute package goods to consumers. Eager to reach the large number of consumers represented by the baby boom, companies began to develop products for that audience.

"Wherever the boomers go, they seem to drag massive segments of the mass market with them," says Alexander Kroll, president and chief operating officer of Young & Rubicam. That targeting began when the baby boomers were still in diapers and is expected to continue until after their retirement.

Targeting customers is just one element of marketing strategy. Because marketing takes in a wide range of functions—from product research and development to testing to sales and distribution—it is difficult to estimate corporate expenditures for the entire process. However, most experts say marketing costs are increasing steadily as companies recognize the importance of the total function.

All this interest in marketing is good news to the advertising industry. "The most important part of business today is marketing, and advertising is the communications arm of marketing," says Walter Weir, who teaches advertising at Temple University in Philadelphia.

There also is a general perception among those in the advertising industry that the public is less critical of their profession these days. "All I am is a salesperson, and at one time that was a negative thing," says Ira Madris, executive vp-creative at McCann-Erickson. "There is a reality now that there's nothing wrong with being a salesperson. In fact, it's something to take pride in because we live in a world that needs salespersons."

"Historically, advertising has been a whipping boy," says Edward C. Stephens, formerly in account and creative positions with Dancer Fitzgerald Sample and now dean of Syracuse University's S.I. Newhouse School of Communications. "We've seen a huge shift since the 1960s. There is a greater understanding of the contributions big corporations have made to the nation and, with that, a greater appreciation of advertising."

According to an Advertising Age survey last fall, consumers *do* have a higher opinion of advertising than even many of the industry's top executives believe. In an advertising-image tracking study prepared for Ad Age by SRI Research Center, Lincoln, Neb., almost 50% of consumers surveyed thought advertising was better or much better (creatively) than a year earlier, and 26% thought advertising was more honest than a year earlier.

Only 13% of respondents thought advertising was worse or much worse in terms of honesty.

If advertising's reputation has improved, so has its financial standing. Advertising executives and observers agree that the industry should maintain a steady growth rate through this century. "Advertising has never been healthier," says Robert J. Coen, senior vp at McCann. "Since 1976, advertising has been growing each year at a rate faster than the economy." Mr. Coen predicts advertising expenditures in the U.S. will increase this year 13.8%, to $85.4 billion. Worldwide advertising industry revenues will exceed $150 billion in 1984 and will reach $287 billion by 1990, he says.

The American Assn. of Advertising Agencies believes that personnel requirements for the industry will continue to increase, with 120,000 people employed by the year 2000, a 17% jump from 1981.

There are other encouraging signs. Direct marketing has seen revenues more than double from $60 billion in 1975 to $150.3 billion in 1983, according to the Direct Marketing Assn. By the turn of the century, the DMA predicts that one in every four consumer dollars will be spent on mail order sales.

It is probable that a good portion of that advertising revenue could come from products that don't exist now. Technology already has created a whole new advertising category called the personal computer. Advertising expenditures for personal computers grew from $93 million in 1981 to $400 million in 1983, and are expected to reach $600 million this year, according to David Simons, president of Digital Video Corp. There is no doubt that technology will continue to provide exciting products to be marketed and advertised. High on everyone's list are robots, which soon could be sold as essential pieces of home equipment.

Government regulations, cut back severely during the Reagan administration, also have opened many new areas for competition. Years ago, who could have imagined that consumers would be bombarded with ads for financial services? Yet the Publishers Information Bureau estimates that financial services advertising spending—including banks, brokers, mutual funds, savings and loan associations, credit cards, life, casualty, fire and other types of insurance—in six media (magazines, supplements, network and spot tv, network radio and outdoor) has increased from $197 million in 1972 to nearly $628 million in 1983.

1984

Projections to note

- Worldwide ad spending —$150 billion
- U.S. ad spending —$85.4 billion
- Ad spending for the personal computer industry (including software and accessories) —$600 million
- Software industry revenues —$3 billion

In addition, deregulation in the drug area will continue to bring to the market many new over-the-counter medications previously available only through prescription, making them eligible for consumer advertising.

Sudler & Hennessey, Young & Rubicam's medical and health services agency, three years ago set up a consumer unit to handle this new business; this year it expects to achieve $30 million in billings from a single assignment, Parke-Davis' Benylin cough syrup.

And there are other products and services that will be advertised for the first time.

William Gibson, Sudler & Hennessey president, anticipates a boom in the health service area as companies rush to fulfill the needs of a generally aging population. By 2025, 58.6 million Americans will be 65 and older; that will represent 19% of the population, or more than double the number of Americans in that age group now.

McCann's Mr. Coen points out that the traditional top advertising categories—food products, cosmetics and apparel—will continue to be the largest revenue producers through this century. Both Selling Areas-Marketing Inc. and Dancer Fitzgerald Sample, which track new products, call the current rate of new product introductions healthy.

In 1983, 1,803 new products were introduced, compared with 1,510 in 1982, according to Marty Friedman, editor of DFS' "New Product News."

If the business climate is providing corporations with a wide array of opportunities, it also is presenting as many challenges. Facing a more educated consumer, marketers now have no choice but to improve their operations.

"I am of the school that says the marketing concept is the essence and the driving force of all business," says Robert Seelert, group vp, General Foods. "The concept of marketing is meeting consumer needs. Everyone is in that business, but the package goods companies have honed those skills and focused on that orientation better than anyone else." He says those skills can be learned by corporations in other industries. "Those who don't measure up will find their business fading away."

Already the landscape is littered with products that never stood a chance of succeeding because they were not backed by sound marketing plans. Some of these casualties have occurred in the personal computer industry. Mr. Weir of Temple University singles IBM out for praise as a computer marketer that did it right. The company delayed the introduction of its personal computer until its marketing program was in place.

Other high technology industries are discovering they must become marketing experts to succeed. "The computer software industry is virtually void of marketing talent," says C. Rowland Hanson, vp-corporate communications at Microsoft Corp., a major software company based in Bellevue, Wash. But that's beginning to change.

Mr. Hanson is representative of the type of talent the software industry is seeking. After stints with General Mills and Carnation Co., he was vp-marketing for Neutrogena when he was approached by Microsoft's owner, Bill Gates. "I am basically a package goods marketer, and there is no doubt that is why I was recruited by Microsoft," Mr. Hanson says.

Growth in the software industry has been nothing short of incredible. Mr. Hanson cites a statistic from Dallas-based market researcher Future Computing that estimates industry revenues will reach $3 billion this year, a 600% increase over 1981.

While the industry's growth will continue, Mr. Hanson says an increasing number of competitors means the pie will be sliced into thinner pieces. Marketing skills, therefore, will become even more essential, he says. And from Mr. Hanson's perspective, the industry has a lot of work to do. "This industry does not understand positioning, market research techniques and how to interpret and apply those results," he says.

Software companies *will* be spending more of their marketing dollars on advertising, industry executives indicate. Personal computer marketers already have found print and direct mail to be the most efficient means of reaching those who own personal computers. "Print does the best job of educating the consumer and providing the benefits of the products you're selling," says Jim Ellerbrake, senior vp-management supervisor at Dancer Fitzgerald Sample, San Francisco, the agency for Grid Systems and its Grid Compass, a high-end portable microcomputer.

Of course, huge advertising expenditures alone cannot buy success. Dallas-based Texas Instruments spent $13.8 million in 1983 on tv commercials for its personal computer, a 334% increase over 1982, according to the Television Bureau of Advertising. Yet those spots, starring Bill Cosby, were not enough to move equipment off retail shelves. Ultimately, Texas Instruments withdrew from the personal computer market.

"Advertising is only part of the marketing task," Mr. Levitt says. "The whole thing has to be symmetrical, consistent. Advertising is not the tail that wags the marketing dog, and marketing is not the dog that wags the advertising tail."

All new products are faced with the same challenge. The consumer must be told about the item or service in terms he can understand. "Advertising has to deliver a discernible message to the proper audience," says Mr. Stephens.

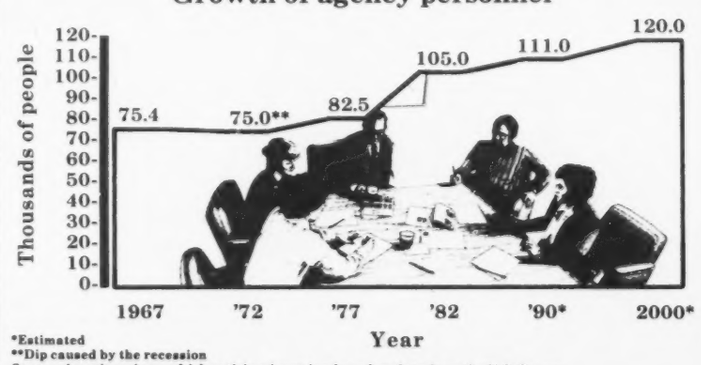
(Continued on Page M-8)

Ad spending by the top 10 over two decades of growth

1960 (million)		1970 (million)		1982 (million)	
1. General Motors Corp.	$168.5	1. Procter & Gamble Co.	$265.0	1. Procter & Gamble Co.	$726.0
2. Procter & Gamble Co.	127.0	2. General Foods Corp.	170.0	2. Sears, Roebuck & Co.	631.2
3. General Foods Corp.	110.0	3. Sears, Roebuck & Co.	130.0	3. General Motors Corp.	549.0
4. Ford Motor Co.	90.5	4. General Motors Corp.	129.8	4. R.J. Reynolds Industries	530.3
5. Lever Bros. Co.	80.5	5. Warner-Lambert	126.0	5. Philip Morris Inc.	501.7
6. General Electric Co.	73.0	6. Colgate-Palmolive Co.	121.0	6. General Foods Corp.	429.1
7. American Home Products	65.0	7. Bristol-Myers	117.0	7. AT&T	373.6
8. Colgate-Palmolive Co.	59.0	8. American Home Products	100.0	8. K mart Corp.	365.3
9. Chrysler Corp.	56.9	9. Ford Motor Co.	90.3	9. Nabisco Brands	335.2
10. R.J. Reynolds Tobacco Co.	50.0	10. AT&T	86.6	10. American Home Products	325.4

Source: Advertising Age "100 Leading National Advertisers" issues.

Growth of agency personnel



*Estimated
**Dip caused by the recession
Source: American Assn. of Advertising Agencies, based on data from the U.S. Census.

As the marketing universe expands, the number of people employed by U.S. ad agencies also will grow—by 17% between 1981 and the end of the century, according to American Assn. of Advertising Agencies projections.

Marketing

(Continued from Page M-7)

The challenge may be greater with a new product or service that is unfamiliar to the consumer. These products often can be explained by linking them to products the consumer already knows about. "With a videocassette recorder, for example, the consumer already is familiar with a tape recorder and a tv set," Mr. Levitt says. "It's understandable."

With other products or services, the task is more difficult. "The hardest thing about high-tech products is educating the people about what the products are going to do for them," says Walter E. Ulrich, president of Walter E. Ulrich Consulting, Houston. Mr. Ulrich gives high marks to Federal Express. "The company committed a tremendous amount of advertising dollars to get across the concept of sending a document overnight," he says. "It was extremely effective."

Harvey Stuart, owner of Fone Booth, a New York retail store, says there is a dearth of consumer information from companies marketing telephones. As a result, Mr. Stuart and his sales staff spend a major part of their time telling consumers what they can and cannot do with regard to owning telephones.

The financial services industry is one that is responding to the consumer's desire for more information. "We are dealing with a new generation of self-propelled investors who feel much more confident about making their own choices," says Victor Kramer, vp-marketing development for Fidelity Investments, Boston.

Consumers now want to shop around before they invest and no longer believe they must pay top dollar to get top quality. One result has been a proliferation of discount brokers and other financial advisers. Mr. Kramer estimates that this year $50 million will be spent on advertising by companies that did not exist before or existed in different forms.

Fidelity Investments, which has two primary lines of business, discount brokerage and mutual funds, does not limit its marketing efforts to advertising. Mr. Kramer says the company emphasizes its 800 telephone number and has recruited a large team of specially trained people to answer phone queries.

Although there is a plethora of computer ads, some ad executives would agree with Mr. Stephens that "there's a confusion over computer advertising. This is leading to consumer complaints and false and misleading advertising."

While the high-tech companies struggle to learn about marketing from food and cosmetic companies, the consumer package goods industry will be faced with challenges of its own. "We're dealing with a much more segmented world," says Mr. Seelert of General Foods. "The challenge for businessmen is how to meet that diversified set of needs with a business system that can also earn a return on investment, when the inherent scale of meeting segmented needs is not the same as it was for mass market items."

The push to meet those segmented needs has resulted in a spate of new products that have crowded some food and cosmetics categories. Ira Madris and Bruce Nelson, executive vps-creative at McCann-Erickson, have coined the term "wardrobe of products" to describe this trend. "There used to be 14 cigarets; now there are hundreds," Mr. Nelson says. "The cereal section of a supermarket now takes up a whole aisle. People have options they didn't before. So if you're coming with a new product in an area where there already is consumer satisfaction, you have to be different to be noticed."

Marketers also are being pressured by the supermarkets. "There's a certain groundswell of opinion that the stores aren't big enough to accommodate the front-runner and the me-tooers," says Alan Miller, vp-sales services manager for Selling Areas-Marketing Inc.

Many in the advertising industry welcome the chance to demonstrate their creative skills. "We place ourselves in the position of the consumer and must show how this product is meaningful," Mr. Nelson says. For example, McCann-Erickson was given the task of promoting Sony Corp.'s new 1-in. screen tv in the crowded electronics entertainment category. "We called it the me-tv and showed that it was a personal tv you could watch all by yourself," Mr. Nelson says. "People understood the concept and the brand sold out this fall."

Everyone has his own guesses about where the future tests of marketing and advertising creativity will be.

Mr. Levitt of Harvard says Wall Street and law and accounting firms in New York are asking him, "How should we market ourselves?"

"In professional circles, marketing used to be a dirty word," notes Ms. Metcalf of Arthur D. Little. "But in today's society, professional services have a greater need to market themselves. They are slow to come to that conclusion, and our company is probably no exception."

Ms. Metcalf says she also believes that the educational community increasingly will turn to marketing to students.

Mr. Ellerbrake of DFS nominates the video phone as a hot new product. "It would not be hard to sell because it isn't hard to operate, and the benefits are easy to see."

Messrs. Nelson and Madris of McCann-Erickson say new services and industries will be created by President Reagan's commitment to build a space station. In addition, they see new businesses being created to cater to an aging population.

Whatever the predictions, one thing is clear: Marketing expertise will be an even more valuable skill in the future. "The future will be a period of significant change and challenge to manufacturers," says Mr. Seelert of General Foods. "It is a time to be bold and take advantage of that change. Those who don't adapt will find themselves falling by the wayside." ■

What marketers see in their crystal ball

- Countdown to shorter commercials—20 seconds, 15 seconds.

- Tv commercials for computer software.
- Marketing by professional companies—legal, medical, account services that previously shunned the limelight.
- Advertising by colleges and universities to attract students.
- Increased migration of package-goods experts to high-tech companies.
- Popularity of print media by high-tech companies to better describe their products.

- Products and services created by U.S. space program.
- Gradual acceptance of other advertising media—videotex, home computers, movie theaters.

- Greater emphasis on creativity to distinguish product in a crowded field.
- Products and services aimed at the over-65 population as the baby boom generation ages.

Looking to the year 2000

How will advertisers reach their audiences in the future?

There seem to be more questions than answers as advertisers and agency executives wrestle with rapidly changing challenges and needs. According to some experts, not too much will change in the media world between now the year 2000, but the goal of holding down costs will make alternative media forms more attractive and important to marketers.

Agency people charged with selecting advertising vehicles will have to be even more sophisticated in their marketing knowledge, executives agree. Allen Banks, executive vp-media director at Dancer Fitzgerald Sample, says, "The choices available to advertisers seem to be increasing exponentially. Someone can't just make a decision by sitting at a calculator punching in numbers."

Network tv will remain the dominant mass medium, agency executives say. Yet, if its audience continues a pattern of erosion, and if production costs continue to rise, advertisers will end up paying more to reach fewer people.

"After 35 years of being a growth medium, tv is becoming a mature medium," says Marvin S. Mord, vp-marketing and research services at ABC. "It will cost more to purchase network tv in the future and deservedly so. It is still the only way you can run a message for Wendy's and have 50% to 75% of the population instantly aware of 'Where's the beef?' "

One solution for the higher costs expected might be a move to shorter, and thus, less expensive commercials. Currently there is concern in the advertising community about the possible rise of the 15-second commercial and the ensuing clutter that would cause. But future cost concerns may force shorter commercials to become the norm.

"Sixty-second commercials used to be standard, now it's 30s," Mr. Nelson says. "What about a four-second commercial?" he says; "Those who have grown up in front of the tv can accept more images."

Mr. Mord agrees viewers are capable of absorbing more information more quickly, but he sees 15 or 20-second spots more likely than shorter versions.

There are many products, especially high tech ones, that would not lend themselves to such short spots. Longer infomercials, once touted as a major selling point by cable channels, would be more appropriate for selling products that need more explanation, ad industry executives say. "The infomercial has never taken off, and cable has built its programing around the 10-30-60 format," says David Simons, president of consulting group Digital Video Corp.

Apple has created interest in its Macintosh personal computer through tv commercials—most notably its dramatic preview "1984" execution—but the company also has depended on a lengthy magazine insert to explain the product. Many experts believe the print media will continue to benefit from the competition not only among computer manufacturers but also from companies marketing financial services that need in-depth description. The Newspaper Advertising Bureau puts 1983 financial services advertising spending in newspapers (including supplements, preprints, r.o.p.) at $595.8 million.

Like cable tv, magazines and newspapers are not doing their best to exploit the situation, some observers say. "Newspapers have the opportunity to make themselves an attractive medium for personal computer advertising," Mr. Simons says. "Yet, few newspapers are taking advantage of this."

Those in financial services actually complain about a lack of adequate advertising vehicles. "We have run out of media," says Victor Kramer, vp-marketing development for Fidelity Investments in Boston. "We run three to seven ads a week in the *Wall Street Journal*, two ads in every issue of *Money* and several in the Sunday *New York Times*," he says. "We are doubling and tripling up in our efficient media because there hasn't been much change in available media."

Somewhere down the road, most experts believe that new forms of advertising will begin to have an influence. Videotex will be one such new medium, although Mr. Simons warns that videotex first must sell itself as a service and not as an advertising vehicle. Mr. Banks says he believes that videocassettes, home computers and movie theaters could become future candidates for such advertising.

Whatever the combination, it seems certain that advertisers increasingly will look to adjust the media they are using. "Ten or 15 years ago, if you had a daytime and prime time tv package, and [ad schedules in] four leading women's magazines, you had tremendous reach," says Robert Seelert, group vp at General Foods. "But today there would be a lot of people that combination would not reach. There is an inherent need for us to broaden the set of marketing vehicles we have access to. That's a challenge to all marketers." --*C.C.*